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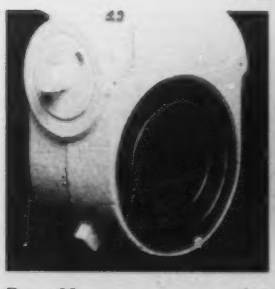
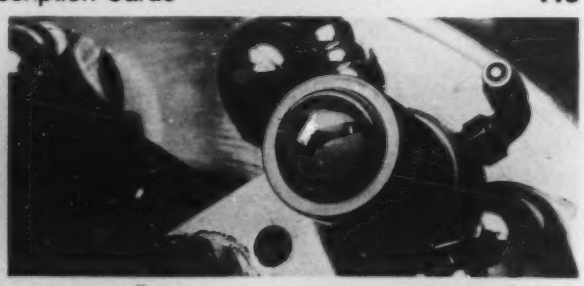
TABLE OF CONTENTS

FEATURES	Automatic Slacks: The Credibility Gap Improved designs narrow slack adjuster credibilty gap.	68
	How To Deflate Tire Costs...Maybe Air pressure monitor/equalizer saves big bucks for fleets.	76
	Shop Tips & Trucks Contest Winners Your ideas for saving time and money in the shop.	81
	Petroleum Tank Product & Services Sampling of tanks and accessory equipment.	88
COLUMNS	Editorial / It's all in the learning curve.	7
	Productivity / How O'Malley's reduced its fleet size.	56
	Safety / Light duty may reduce malingering.	58
	Technology / Why a double-drawbar dolly?	60
	Washington Report / Study to determine impact of safety factors	62
	National Commentary / CDL program may succeed, but at what cost?	64
DEPARTMENTS	Reader's Forum	10
	Up Front	14
	Industry and Washington News	18
	Laugh It Off	48
	Fleet Forms	53
	Coming Events	54
	Classified Advertising	109
	Advertisers' Index	111
	Truck Talk	112
PRODUCTS	New Products And Services	94
	Publications	108
POSTCARDS	Truck Talk and Reader Service Cards	113
	Subscription Cards	115



Page 68



Page 76

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IN THE NEXT ISSUE

Forewarned is forearmed! All interstate, private and common carriers lacking a U.S. DOT safety rating are targeted for an on-site compliance review lasting three to four hours. CCJ's December issue can help fleets prepare for a review by revealing the questions a DOT investigator will ask and the paperwork/files he will want to see.

Preparation is essential because the review will establish a safety rating that's difficult to change. A DOT safety-fitness rating labels an interstate carrier's accident-prevention and compliance efforts as satisfactory, conditional or unsatisfactory. Anything less than a satisfactory rating may have "an extremely detrimental effect" on your business and/or insurance premiums, cautions the American Trucking Associations. □

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Teamsters rally behind Presser to fight takeover attempt

Continued

said: "We are fed up with the government's big-bully tactics. We are not going to take it any more. We are going to fight back. We are going to win this war. You are the soldiers."

Republican presidential candidates Jack Kemp of New York and former Secretary of State Alexander M. Haig Jr., plus Democrats Jessie Jackson and Sen. Paul Simon of Illinois, voiced messages of support and condemned the Justice Department's actions.

While the federal government has never taken over a national union, it has been able to take control of a union local. Teamster Local 560 in Union City, N.J., the largest Teamster local in the country with about 8,000 members, has been under the trusteeship of a federal judge for more than a year. The Local, which was controlled for nearly 30 years by the Provenzano family, was found to be under the influence of organized crime.

Anthony, Salvatore and Nunzio Provenzano are currently in federal prison for crimes ranging from murder to racketeering and fraud involving Local 560 medical and dental plans. At the time of his conviction, Salvatore Provenzano was an international vice president and member of the Union's powerful executive committee.

Local 560 is currently being run by Edwin Stier, 47, a former director of the New Jersey Division of Criminal Justice. The Local's leadership in recent months organized a campaign to get the Local restored to the rank-and-file, but, so far, that campaign has been unsuccessful. The court has suggested that the Local is still dominated by organized crime and that other members may yet be indicted on criminal charges that could also involve some major motor carriers operating in the Northeast.

Presser told the 4,000 members that DRIVE, the Union's political action committee, may spend as much as $6 million to lobby against the Justice Department and the takeover effort. The Union's use of the rank-and-file to influence public and political issues has been traditional with the Teamsters since the days of ex-presidents Dave Beck and Jimmy Hoffa.

"You and your members must flood your congressional offices with letters, post cards and phone calls...to get Congress to say 'No, you can't do this,'" Presser said, as lobbying kits were distributed to the members.

Union officials have expressed anger over the threatened Justice Department indictment. Second in command Weldon Mathis of Atlanta, Ga., said: "This organization is not a haven for thugs, gangsters or crooks. I'm not dominated by organized crime; I don't know anybody in organized crime." Mathis, who reportedly was brought to Washington by the late Union president Frank Fitzsimmons to serve as his assistant and regular golfing partner, is now the Union's secretary-treasurer.

While the Union's leadership continues to deny any links to organized crime, the President's Commission on Organized Crime in a report last year identified the Teamsters as one of three national unions dominated by the Mafia. That perception of the Union was reinforced this summer in taped testimony by former Teamster president Roy Williams of Kansas City, who told a federal courtroom that the Union had been dominated by organized crime for as long as he could remember. Williams is now serving a term in federal prison for racketeering.

In related news, John Climaco, Presser's lawyer, reportedly told a Cleveland federal judge that his client, Presser, has recovered sufficiently from cancer treatments to stand trial on a federal indictment charging the Union leader with embezzling $700,000 in Cleveland local funds allegedly paid to employees who did no work. Presser was indicted in May 1986, but his trial, slated to start in August, was delayed because of Presser's surgery for two lung tumors. □

IBT may have $15 million in PAC funds to battle takeover

By **CARL GLINES**, *Executive Editor*

In his speech to 4,000 members in Cincinnati, Oh., in September, Teamster president Jackie Presser said the Union was prepared to spend $6 million in a national lobbying campaign to block a threatened Union takeover by the U.S. Justice Department.

The money, Presser said, would come from DRIVE, the Union's controversial Democrat, Republican Independent Voter Education fund. In a recent 18-month period, DRIVE raised 10 times more in contributions than it had four years earlier.

For the 18-month period ending June 30, 1986, Federal Election Commission records show that the Union raised $2,806,109, although Teamsters membership reportedly declined from a high of 2.3 million to 1.8 million members. Membership in the Union's freight hauling division, which has dominated Union policy, has reportedly dropped to about 150,000 from an earlier high of about 400,000.

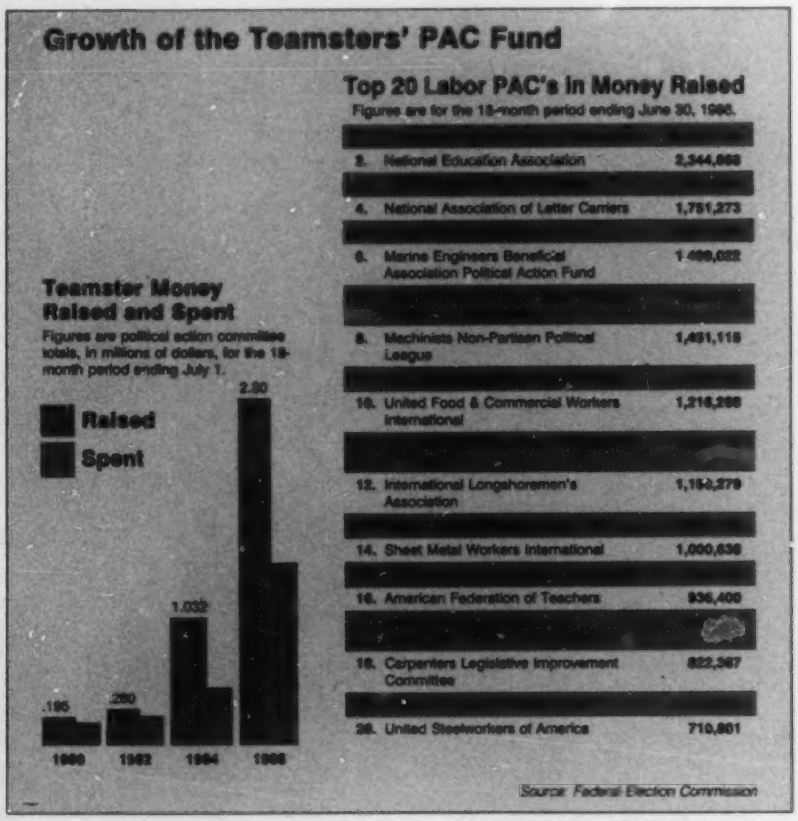
The reason for the significant increase in DRIVE funds, however, is a negotiated Union checkoff system that allows a $1 weekly payroll deduction from all Union workers. The checkoff system was written into the Union's last national three-year contract, despite some rank-and-file opposition to it. That contract is due to expire in April 1988.

Prior to the existing Union contract, rank-and-file contributions

Continued

IBT may have $15 million in PAC funds to battle takeover

Continued


Growth of the Teamsters' PAC Fund
Teamster Money Raised and Spent
Figures are political action committee totals, in millions of dollars, for the 18-month period ending July 1.
Raised
Spent
.195
.280
1.032
2.30
1980
1982
1984
1988
Top 20 Labor PAC's in Money Raised
Figures are for the 18-month period ending June 30, 1986.
2. National Education Association 2,344,868
4. National Association of Letter Carriers 1,751,273
6. Marine Engineers Beneficial Association Political Action Fund 1,499,022
8. Machinists Non-Partisan Political League 1,491,116
10. United Food & Commercial Workers International 1,216,268
12. International Longshoremen's Association 1,154,279
14. Sheet Metal Workers International 1,000,636
16. American Federation of Teachers 936,400
18. Carpenters Legislative Improvement Committee 822,367
20. United Steelworkers of America 710,801
Source: Federal Election Commission

to DRIVE were on a voluntary basis. Union president Presser is generally credited with getting the payroll deduction plan written into the last agreement with unionized carriers.

In October 1986, Wallace Clements, director of DRIVE, said the Teamsters would collect $5 million by the end of 1986 for political campaign purposes and that the fund would have $15 million available to spend by the 1988 general election. DRIVE's financial resources are not normally made public by the Union except once every five years when the Union meets in convention and presents a report on Union activities to the membership. That report is required by federal law.

Increased spending by DRIVE is expected to provide the Union with increased influence on Capitol Hill, despite the Union's longstanding reputation for being corrupt. That will probably make the Justice Department's job all the more difficult, since pressure is already building within the country's labor movement to stop the proposed federal trusteeship.

Mark Rodgers, who handled labor liaison for the Republican National Committee in 1986, said: "Obviously, when you have more money to spend, you obviously get your message out."

David A. Sweeney, the Union's top lobbyist, said: "If you're going to be a player in the game, you owe it to your members to have a PAC [political action committee]. I think the politician thinks if you're raising a lot of money, it improves your acceptability because you're a political force to be reckoned with." □

PTCA trying to limit impact of new Texas laws

From CCJ's Washington Bureau

New laws in Texas requiring private carriers to register and meet new insurance limits has triggered a national effort by the Private Truck Council of America (PTCA) to try to block similar efforts in other states.

PTCA is trying to convince the states to "increase direct enforcement efforts against the actual trucks and drivers on the road, rather than imposing paper-shuffling burdens that are at best marginally beneficial in protecting the public."

And PTCA is asking the Texas Railroad Commission, that state's regulatory body, to apply the new laws only to vehicles with a GVW in excess of 26,000 lb, and require only a $300,000 single combined insurance limit applied to private fleets with vehicles over 10,000 lb.

In addition, PTCA says the Texas Railroad Commission "does not have, and should not assume, authority to cancel a private fleet's registration and effectively keep that company from operating any vehicles in the state."

PTCA told the commission that it considers the registration of private carriers an "unnecessary regulatory burden, unwarranted by any safety considerations. Statutory provisions mandating private carrier registration and insurance are a bald effort by the regulated carriers in Texas to place another regulatory obstacle in front of their competitors for freight," concluded the PTCA. □

U.S. Truck rejects Baytree

Chicago—A proposed tender offer by Baytree Investors of Chicago for U.S. Truck Lines Inc., of Delaware was rejected by the truck line's board of directors. Instead, the board voted to examine other moves including restructuring the size of the company to maximize shareholder values and to defer payment of a regular 15¢ quarterly dividend. □

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COMMERCIAL CARRIER JOURNAL

DRUG SCREENING

ASIA Heavy Duty Distributor Directory

CHILTON'S
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VOLUME 145 NUMBER 1 JANUARY 1988

TABLE OF CONTENTS

FEATURES	ASIA Heavy Duty Directory Exclusive listing, by state, of products & service	37
	Federal Regulatory Preview for 1988 A projection of next year's legislation and rules	81
	A Fleetmen's Guide to Drug Screening Details on various tests and lab selection	84
	Measuring Municipal Maintenance Efficiency How New York uses private sector costs as a barometer	91
COLUMNS	Editorial / RCCC refutes CCJ October '87 editorial	7
	Productivity / PLK's flexible cross-beam system	26
	Safety / EPA changes tank reg proposals	28
	Technology / Fleetmen offer design suggestions at SAE	30
	Washington Report / Reg enforcement swamps DOT	32
DEPARTMENTS	Reader Forum	10
	Industry/Washington News	12
	Laugh It Off	20
	Coming Events	22
	Classified Advertising	120
	Advertisers' Index	122
	Truck Talk	123
PRODUCTS	New Products And Services	96
	Publications	118
POSTCARDS	Truck Talk and Reader Service Cards	113
	Subscription Cards	115

Page 37

Page 91

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IN THE NEXT ISSUE

February's cover story will tell how the quality philosophy, fostered by Dr. Edwards Deming, has begun to change the way trucking companies operate.

Deming was a major influence in changing the Japanese from producers of cheap, imitative goods to a major economic force.

Keys to becoming a "quality company" are: continuous employee training; single sourcing of supplies and services, with quality taking precedence over price; partnerships with customers; elimination of measuring quality purely on the basis of quotas, and the fear they generate; creation of an environment where management and workers have mutual respect, where there are no barriers to communications, and where employees can have pride in their work. □

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DRUG SCREENING

Despite drug screening's apparent benefits, most fleets aren't testing employees or applicants. And some carriers that test for drugs are woefully ignorant of accepted standards and procedures. Since the federal government is likely to mandate testing this year, it's time for fleetmen to become familiar with the basics of drug screening. This article discusses why carriers should screen, and offers detailed information on how fleet managers can evaluate available procedures, avoid specimen collection problems and select a credible testing lab.

By **PARRY DESMOND**
Executive Editor

Fearful that a zonked out driver or a "high" mechanic who incorrectly installs brake shoes, will cause an accident that could bankrupt the company, many fleets are screening current and/or prospective employees for drug abuse.

But *all* interstate motor carriers may have to hop on the drug screening bandwagon if testing is mandated by the Feds, possibly this year according to Washington insiders. Congress and the Federal Highway Administration recently proposed drug screening requirements that could become effective in 1989.

In addition to reducing the likelihood of an expensive lawsuit as the result of an accident, incentives include fewer workers' compensation and damaged freight claims, better applicants and improved productivity—all leading to bigger profits.

But inquiries of trucking company managers, government officials and drug testing professionals reveal that most fleets aren't testing for drugs, despite the apparent incentives.

Continued

Importance of Factors Selecting a Drug Testing Lab

	Critically Important	Very Important	Somewhat Important	Not at all Important
Accuracy	31%	62%	0%	7%
Forensic Quality	30	43	17	10
Turnaround	22	56	15	7
Litigation Services	21	39	25	14
Service & Convenience	13	60	23	3
Number & Type Drugs Tested	11	52	26	11
Price	3	34	28	34

Percentages do not sum to 100% because "not sure" responses are not included and slight rounding differences occur as a result of the weighting algorithm.

Source: "Survey of the Fortune 500" by Noel Dunivant & Associates, Raleigh, N.C., October 1985.

An informal survey, conducted by CCJ in cooperation with American Trucking Associations (ATA), points out that some carriers that screen are woefully ignorant of accepted standards and procedures key to a successful, cost-effective drug testing program.

This article focuses on basic information fleet management should know about drug testing: an analysis of available tests; how to avoid specimen collecting problems; how to select a testing laboratory.

This story will concentrate on testing urine specimens since it's reputedly the most efficient, cost-effective method of detecting use of illegal substances.

In the balance of the series, controversial issues such as potential legal problems with rehabilitating drug using employees, possible federal mandates, testing under provisions of the Teamsters Master Freight Agreement, and random testing will be discussed.

Why test?

In 1985, Noel Dunivant and Associates, a Raleigh, N.C., research and consulting firm, conducted a survey on drug policy and testing of 180 major U.S. corporations—many with private fleets.

The survey found that 18% of those companies conduct some form of drug screening. Since then, many more firms have initiated testing.

The survey reported the most common types of screening done by those corporations were pre-employment (80%); probable cause after an accident (47%); as part of annual physicals (19%); random tests of employees (13%).

An adverse event, such as a serious accident attributable to an employee under the influence of drugs, was the reason 42% of the companies started drug testing. Concern for the safety of employees was the second ranked (26%) reason.

Few companies started drug programs to increase productivity or because of the high incidence of drug use reported in national surveys.

The Dunivant survey also determined that:

- 53% of respondents thought less than 5% of their workers use drugs, excluding alcohol, to the point that it adversely affects their performance.
- When ranking factors to measure the most important attributes to a drug testing program, 49% placed accuracy as number one. Forensic quality—the ability of the test to stand up as evidence in court—also was highly rated. Companies consider price to be of little concern, compared to accuracy and forensic quality.
- Drugs being tested for by more than 65% of the respondents include cocaine, marijuana, Quaaludes, opiates such as heroin and codeine, PCP, amphetamines, barbiturates, methadone and alcohol.
- Respondents, almost unanimously, reported that top management was satisfied with their drug programs.
- Fewer unskilled job applicants and fewer accidents were the most often mentioned responses when companies were asked positive effects of their programs. Asked to mention a negative effect, the companies' single most response was "nothing."

Types of initial tests

Urine is tested for drug use, whereas blood is analyzed to determine alcohol levels in the body.

That is because urine concentrates drugs, while substances like alcohol are being constantly filtered out of the blood, according to Dr. Richard Cohn, a toxicologist who owns a Warminster, Pa., testing laboratory. He is a nationally recognized expert witness at legal proceedings concerning drug screening.

Cohn also notes that the same test should be given to all employees being screened—no matter how safety sensitive their job is—to avoid legal problems.

The amount of time a drug is detectable in body fluids depends on the drug used, the amount and purity of the drug, how often a person uses it, and the user's age, weight and metabolism rate. For example, THC—the active ingredient in marijuana—can show up in a urine specimen as many as 60 days after the last inhalation, particularly with frequent users. Cocaine, however, usually isn't detectable three days after use.

The most-common urinalysis test methods are:

• **Enzymeimmunoassay (EIA).**
EIA tests can be conducted on-site or by an outside lab.

The most common EIA is the EMIT (Enzyme Multiplied Immunoassay Technique) Drug Detection System, made by the SYVA Co., Palo Alto, Calif.

Basically, EIA causes a urine sample to change color, as measured by a spectrophotometer, to detect and identify drugs.

On-site EMIT testing is less costly than lab testing, provides results immediately and can be conducted by non-technical people using a $4,700 desktop-size analysis machine.

Disadvantages to on-site testing are: potential confidentiality and sample-tampering problems; employer's responsibility for maintaining equipment and chemicals used for testing; need for a secure area to store urine samples; a greater likelihood of errors in results because lab technicians are better trained and higher quality control measures are used.

• **Radioimmunnoassay (RIA).**
The most frequently used RIA is Abuscreen, made by Roche Diagnostics, Nutley, N.J. Basically, low-level radiation is measured with a gamma counter to detect and identify drugs.

RIA tests must be conducted in a licensed lab by technicians trained to deal with radioactive materials.

• **Thin layer chromatography (TLC).**
This test involves "reading" a plate on which chemically-treated drops of urine have been placed.

Drugs are detected and identified visually, via a color change. Since a tell-tale color fades within minutes, there is no permanent record of the test results unless a photograph is taken.

Reading TLC test results requires a high degree of technical expertise.

Although they are slightly more sensitive and give a more definitive test result than TLC tests, EIA and RIA tests don't identify some prescription drugs picked up by a TLC test. But TLC doesn't always detect as minute a quantity of a drug as immunoassay tests.

What they detect

According to "Urine Testing in the Workplace," published by the American Council for Drug Education," EIA and RIA tests are designed to detect eight abused drugs or drug classes: amphetamines; barbiturates; benzodiazepine (Diazepam); cocaine; cannabinoids (marijuana); opiates (i.e. heroin, codeine); methaqualone (Quaaludes); phencyclidine (PCP).

Although there are hundreds of drugs which are illegal unless authorized by a physician's prescription, minimal testing must include marijuana and cocaine, according to U.S. Department of Health and Human Services guidelines for testing federal employees. Opiates, amphetamines (speed) and PCP are also basic candidates for testing.

Confirmation testing

Drug testing professionals agree that a confirmation (backup) test must be different in format and chemical theory from that of the initial test. Follow-up with another initial-type test is inherently flawed, explains Cohn, because an initial test only determines that additional analysis, via a confirmation test, must be done.

Cohn also notes that confirmation tests are necessary because, for example, 500 legal substances can generate a positive amphetamine reading.

However, the CCJ/ATA survey shows that some of the labs motor carriers use try to confirm results of the first drug test by doing another initial-type test. The most rigorous and precise secondary test reportedly is the combination of gas chromatography and mass spectrometry (GC/MS). The GC/MS process breaks down a specimen's compound molecules into patterns that are matched with patterns of known drugs.

GC/MS usually isn't used for initial testing because it requires expensive, sophisticated equipment and must be performed by highly trained technicians.

Test prices

Prices charged for drug tests vary widely, depending on the method used, the level of security and quality control, documenta-

Continued

Gas chromatography and mass spectrometry (GC/MS), which requires expensive, sophisticated equipment and highly trained technicians, is the most precise confirmation test.

tion requirements, and the number of drugs analyzed, according to results of a survey recently published in the Journal of the American Medical Association (JAMA).

However the JAMA study shows that the cost of an initial test ranges from $5 to $20. And GC/MS secondary tests are priced from $30 to $100.

In addition to legitimate factors such as volume discounting and the types of drugs being tested for, the wide pricing range also may reflect fleet management's lack of sophistication about drug testing.

Collecting the specimen

There have been numerous horror stories in newspapers and on television about sloppy or fraudulent drug testing. And drug screening has attracted fast-buck artists trying to capitalize on a market expected to reach $400 million in annual sales of test product and service by 1991.

Proper testing begins at the specimen collection site, which can be in a carrier's or a physician's office, a hospital, a clinic or an independent lab.

Collection sites are the "weakest link" in the drug screening process, says Cohn.

Many of the specimen collection site policies and procedures noted below are incorporated in the U.S. government's guidelines for testing federal employees, and are being used by private companies and testing laboratories.

Here's a checklist motor carrier managers can use to evaluate a potential or existing collection site.

- Place a bluing agent in toilet tanks at the site so the reservoir in the toilet bowl remains blue. There shouldn't be another source of water in the enclosure where the individual urinates.
- Ask testees for photo identification. If unavailable, have a camera on hand to take a mug shot.
- Testees should remove outer garments and turn in items such as purses and briefcases. They might be used to conceal items, such as another person's specimen or substances that can be used to tamper with or adulterate a specimen.
- Testee's unusual behavior or appearance should be recorded.
- Testee must wash hands before and after urinating.
- Until the testee urinates in the privacy of a stall or partitioned area, don't leave him/her alone or allow access to water (hot water can be used to heat contraband urine to an appropriate temperature) or cleaning agents.
- If the site is a public restroom, a site employee of the same sex should accompany the testee into the restroom. After putting a bluing agent in the toilet bowl, the site employee should stay in the restroom (but outside the stall) while the testee urinates in a disposable specimen container. Only the site employee should flush the toilet.
- When the site employee gets the specimen from the testee, make sure there's at least 50 ml of urine in the container. If not, try to collect additional urine.
- Less than four minutes after it's collected, measure the specimen's temperature and inspect it for color and signs of contamination. If the temperature is less than 90.5°F or more than 99.8°F, or other unusual findings are observed, another specimen must be collected, under direct observation. Both specimens should be sent to the laboratory.
- Each stage of the analysis process—including collection, testing, results reporting to clients and storage of specimens until they can be thrown away, plus unforeseen problems—must be recorded on a chain of custody form.
- The testee and the site employee should have the specimen in sight at all times prior to its being tamperproof-sealed and labeled.
- The identification label should include the date, testee's specimen number and other required information. The testee must then initial the label on the container.
- The information on the label should be entered in the site's ledger, and the site employee and testee should sign their name beside that information.
- The testee should read and sign a statement verifying that it's the testee's specimen.
- The site employee should complete the chain of custody form. If the site employee must leave the

It is critical that specimen collection sites and laboratories constantly track the testing process on a chain of custody form to avoid potential legal problems. This screen reflects the system CompuChem Laboratories, Research Triangle Park, N.C., uses to supplement the form.

area during the collection process—even momentarily—the chain of custody form and/or the specimen must be taken along or secured.

• With each transfer of possession, the chain of custody form must be dated, signed by the individual accepting the specimen, and the purpose of the transfer should be noted.

• When mailing specimens to a testing laboratory, they should be packed in a tamper-proof container. A site employee should sign and date the tape sealing the container and ensure that the chain of custody form is attached. An outer mailing wrapper is placed around the sealed container.

Many collection sites use express package services such as UPS or Federal Express to mail specimens because speedy transport should preclude deterioration of the specimens, and a record of receipt is available.

Lab Inspecting

Dr. Cohn, who inspects labs for the Teamsters Union, recommends that fleet managers visit a lab to determine if its procedures meet scientific and legal standards.

Based on suggestions made by drug testing professionals, listed below are procedures to look for when assessing the merits of a lab.

• A written agreement with a lab should include the right to make unannounced inspections at any time.

• Check out the lab director's credentials and his staff's qualifications. And if there is a state licensing program, check with those authorities to see if the lab is registered and/or certified.

• Labs that do a high volume of drug testing—at least 300 tests per week—is an indication (but no guarantee) that it has the trained personnel, equipment and established procedures to provide motor carriers with reasonable service.

• A lab should have at least one employee qualified to testify at legal proceedings. Before signing a contract with a lab, its legal track record should be checked.

• For obvious reasons, access to all parts of a testing lab must be controlled. A lab should have an alarm to signal intruders or a break-in. And a sprinkler system will enhance the security of test data.

• Lab personnel must inspect incoming specimen packages for evidence of tampering and compare information on the specimen container label with that on the chain of custody form, which accompanies the specimen throughout the lab's possession. Discrepancies must be recorded.

Evidence of tampering should be reported immediately to the client and be noted on the chain of custody form.

• Specimens are refrigerated if testing isn't to be done within two days of arrival at the lab.

• In addition to sending a certified copy of the test results to the client, a copy also should be retained by the lab for at least two years.

• Confirmed, positive specimens should be kept frozen for at least 365 days to be available for potential retesting as part of legal proceedings.

When frozen over a period of time, specimens with some drugs may not stay at the same testing criteria level used in the original analysis.

• Labs should have an internal quality assurance program that encompasses specimen collection, screening and confirmation procedures, chain of custody, security and reporting results.

• Each batch of samples tested should include, in addition to quality control specimens sent by clients, specimens that either have no drugs or are fortified with known substances. Similar controls should be applied with confirmation tests.

• In addition to documentation on all aspects of testing, labs should retain for at least two years: personnel files on employees who have access to specimens; chain of custody documents; quality control and accreditation inspection records; hard copies of computer-generated data.

• Before results are certified as accurate and released to a client, they and backup data should be reviewed by the lab director or a certifying scientist. The report should

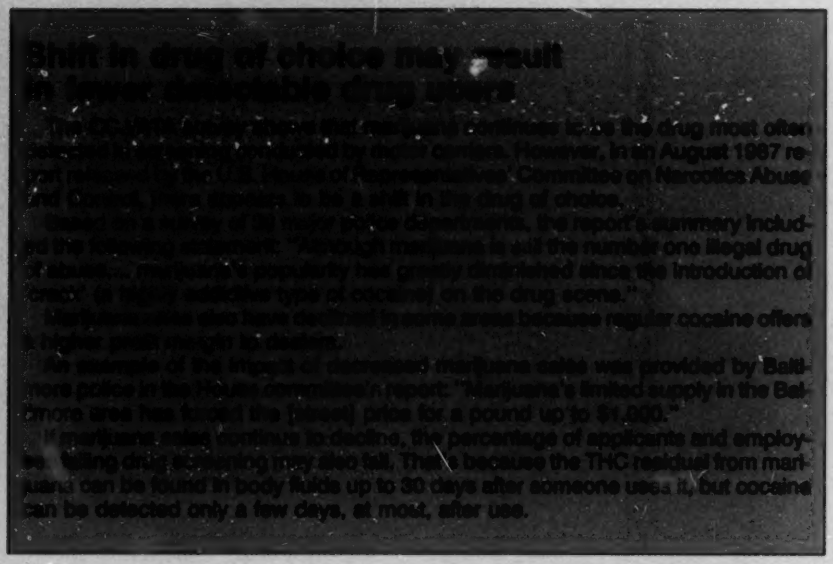
Continued

Drug Detection Periods

Drug	Detection Period
Amphetamines	
Amphetamine	2 - 4 days
Methamphetamine	2 - 4 days
Barbiturates	
Amobarbital	2 - 4 days
Butalbital	2 - 4 days
Pentobarbital	2 - 4 days
Phenobarbital	Up to 30 days
Secobarbital	2 - 4 days
Benzodiazepines	
Valium (Diazepam)	Up to 30 days
Librium (Chlordiazepoxide)	Up to 30 days
Cocaine	
Benzoylecgonine	12 - 72 hours
Cannabinoids (Marijuana)	
Casual Use	2 - 7 days
Chronic Use	Up to 30 days
Ethanol (Alcohol)	12 - 24 hours
Opiates	
Codeine	2 - 4 days
Hydromorphone (Dilaudid)	2 - 4 days
Morphine (for Heroin)	2 - 4 days
Methaqualone (Quaalude)	2 - 4 days
Phencyclidine (PCP)	
Casual Use	2 - 7 days
Chronic Use	Up to 30 days

Detection periods vary; rates of metabolism and excretion are different for each drug and user. Detection periods should be viewed as estimates. Cases can always be found to contradict these approximations.

Source: May 1987 newsletter published by PharmChem Laboratories, Menlo Park, Calif.


Shift in drug of choice may result
in fewer detectable drug users
The Drug Enforcement Administration says that cocaine is now the drug most often
detected in urine samples analyzed by drug-testing companies. However, in an August 1987 re-
port prepared for the U.S. House of Representatives' Committee on Narcotics Abuse
and Control, there appears to be a shift in the drug of choice.
Based on a survey of 39 major police departments, the report's summary includ-
ed the following statement: "Although marijuana is still the number one illegal drug
of abuse, ... marijuana's popularity has greatly diminished since the introduction of
crack, [a highly addictive type of cocaine] on the drug scene."
Marijuana sales also have declined in some areas because regular cocaine offers
a higher profit margin to dealers.
An example of the impact of decreased marijuana sales was provided by Balti-
more police in the House committee report: "Marijuana's limited supply in the Bal-
timore area has forced the [street] price for a pound up to $1,600."
If marijuana sales continue to decline, the percentage of applicants and employ-
ees failing drug screening may also fall. That's because the THC residual from mari-
juana can be found in body fluids up to 30 days after someone uses it, but cocaine
can be detected only a few days, at most, after use.

include drugs tested for and their threshold concentrations.

Instead of just positive or negative test results, some labs will provide quantified results that reflect, for example, the amount of drug traces found in a specimen.

• The faster a lab can provide a client with test results, the less costly it will be for the client. For example, waiting for results of post-accident testing while the employee is on paid leave of absence can be expensive to an employer. A lab should be able to report negative test result within 24-48 hours, while positive results should be available in three or four days.

Telephoning test results to a client, with mailed hard copy follow-up, is risky, particularly when reports are being made on a large number of tests.

That should only be done in isolated, emergency cases. Large labs have telex, electronic mail and facsimile services for expedited reporting to clients.

Be careful

Employers must be careful when reviewing test results. An employee found with 100 nanograms (ng) —billionths of a gram—of THC (the active ingredient in marijuana) in his urine has not necessarily smoked more marijuana or "toked up" more recently than someone with a reading of 50 ng, according to the American Council for Drug Education.

It is possible that the amount of THC from marijuana found in a urine specimen will be greater in the afternoon than in the morning, even though there was no drug use in between.

That's because the intake of fluids can change the concentration of marijuana metabolites as they are gradually secreted from the body.

Just because initial and confirmation testing generate positive results doesn't mean the applicant or employee is a drug abuser. So, a physician should be available to a motor carrier to consider alternate medical explanations, particularly since barbiturates and codeine are legal prescription drugs. Poppyseeds on dinner rolls, some types of tea and non-prescription cold medicines are examples of items that can produce erroneous test results.

The physician should have access to the testee's medical history and records, and the lab's data. And there should be an option to retest the original sample when warranted.

For more information

The publications noted below provide additional detailed information on drug testing.

- *"Scientific and Technical Guidelines for Drug Testing." 1987. The Alcohol, Drug Abuse, and Mental Health Administration, U.S. Department of Health and Human Services, Rockville, Md. 20852*
- *"Urine Testing in the Workplace." The American Council for Drug Education, Rockville, Md.*
- *"Beating the Drug and Alcohol Problem in the Workplace." 1986. Business and Legal Reports, Madison, Conn. 06443*
- *"Standardized Drug Screening for Trucking Companies." October 1986. Developed by Baley O'Connell and Associates in cooperation with the Interstate Carriers Conference, Alexandria, Va. 22314*
- *"Alcohol and Drugs in the Workplace." 1986. Bureau of National Affairs, Rockville, Md. 20850*
- *"Urine Testing for Drugs of Abuse." Research monograph series, National Institute on Drug Abuse, Rockville, Md. 20857.* □

Management Bottom Line

- **Testing generates: better applicants; fewer accidents and claims; more productivity.**
- **80% of major corporations screen applicants and 47% test after an accident.**
- **Preeminent test factors: accuracy and forensic quality.**
- **Initial tests: EIA, RIA and TLC. GC/MS: best confirmation test.**
- **Specimen collection sites are testing's "weakest link."**
- **A physician should verify test results.**

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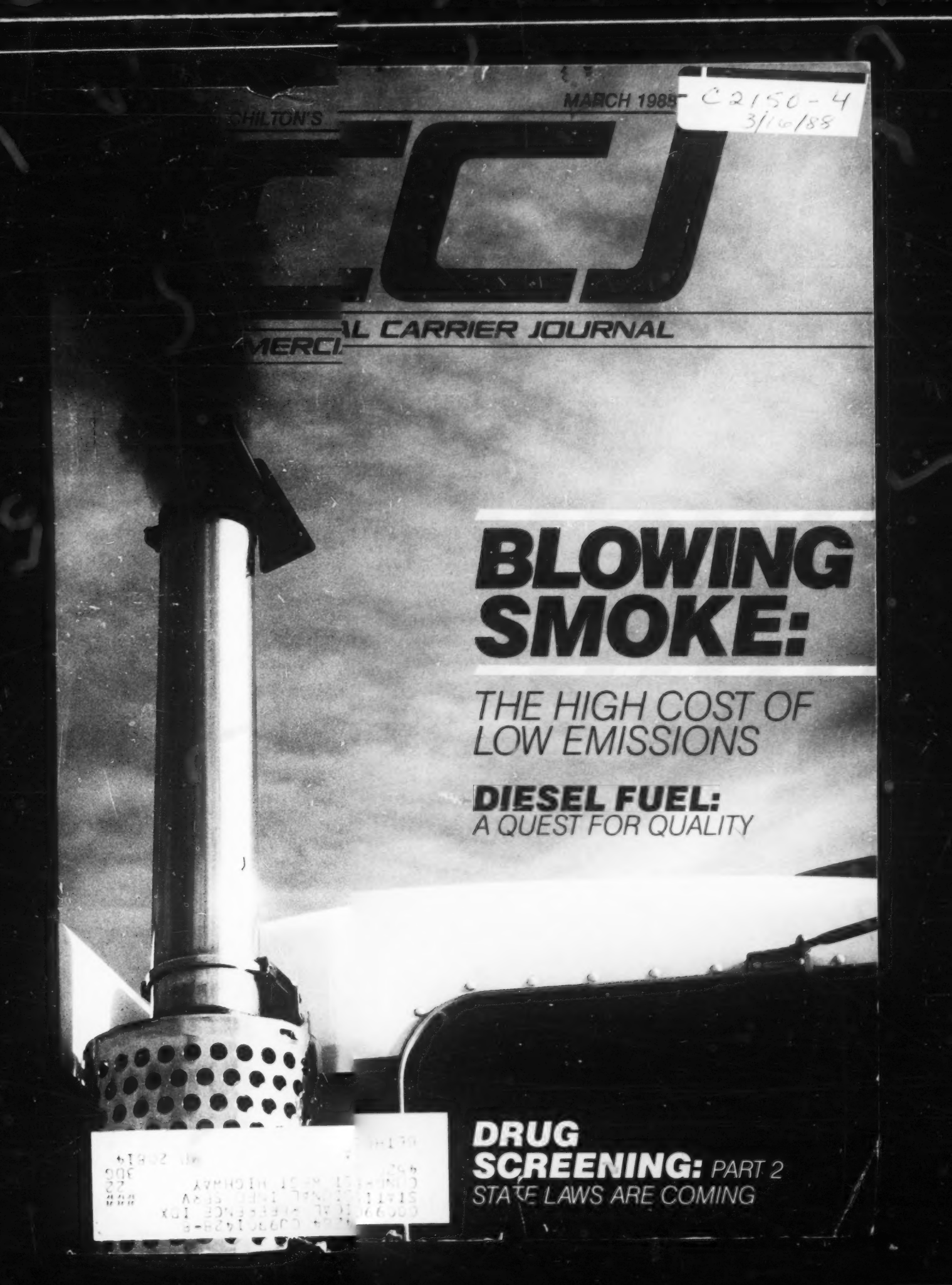

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THE HIGH COST OF LOW EMISSIONS

DIESEL FUEL:
A QUEST FOR QUALITY

DRUG SCREENING: PART 2
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VOLUME 145 NUMBER 3 MARCH 1988

TABLE OF CONTENTS

FEATURES	Blowing Smoke: The High Cost of Low Emissions Solution to pollution could cost $1,000 to $3,000	62
	Diesel Fuel: A Quest for Quality Just say "no" to inferior fuel	68
	State Drug Test Laws: Poison Pills for Trucking State screening rules are creating problems for fleets	74
COLUMNS	Editorial / Is your drug screening program legal?	9
	Productivity / How to keep lift trucks from eating profits	54
	Safety / A fearless forecast about fuel tank insurance	56
	Technology / An air suspension with a new twist	58
	Washington Report / CDL standards can be testing	60
DEPARTMENTS	Reader's Forum	12
	Up Front	16
	Industry and Washington News	20
	Laugh It Off	48
	Fleet Forms	50
	People	52
	Classified Advertising	107
	Advertisers' Index	110
	Truck Talk	111
PRODUCTS	New Products And Services	80
	Publications	106
POSTCARDS	Truck Talk and Reader Service Cards	97
	Subscription Cards	99

Page 62

Page 68

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IN THE NEXT ISSUE

CCJ's Fleet Reference Annual helps carriers by providing up-to-date information on: interstate reciprocity, including agreements among states; government agencies to contact for information on registration, reciprocity, sizes and weights, permits and taxes; state-by-state charts that show vehicle size and weight limits, and access restrictions; maps that reflect states' fuel and third structure taxes, and where long combination vehicles can travel. The April issue also includes specs and prices of shop equipment and postcards that can be used to solicit catalogs and brochures. □

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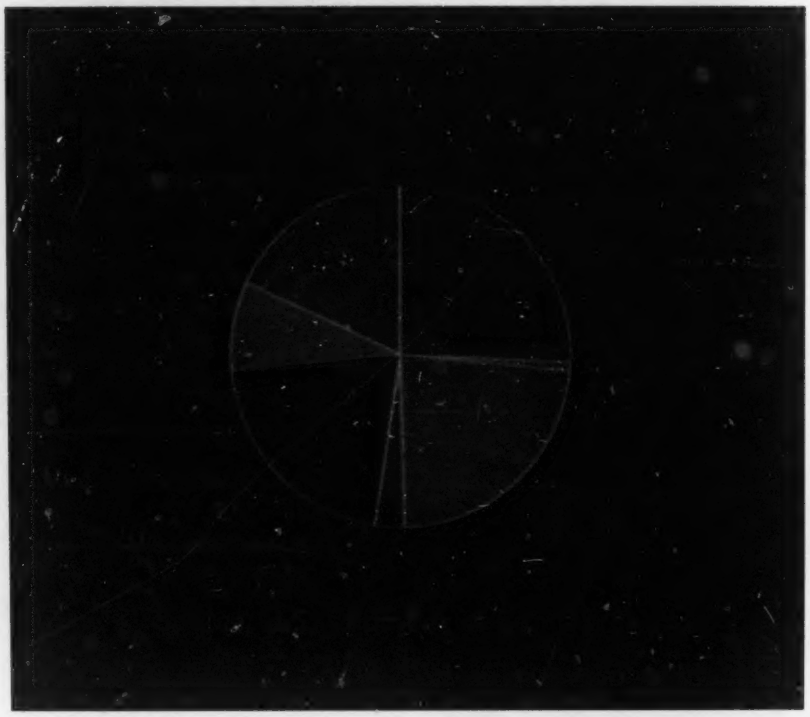

Mandated benefits may severely hurt small fleets

By **NEIL REGEIMBAL**,
Washington Editor

IN THE NEWS:

Circle Express and Roadrunner announce merger 24

Burnham Service Corp. acquired by Investcorp 24

Berggren says Volvo GM will be third in heavy truck market .. 28

Heavy shipping container problems discussed 28

Burnley: DOT to set up drug testing regs 32

CHP makes 130 drug-related arrests 32

Freightliner sales up 34% 32

Wrangling over federal hazmat rules continues 36

1987 retail truck sales set record 36

Firms celebrate birthdays 36

DOT seeks compromises with states over highway access .. 40

Commercial Carrier Journal wins two Neals 40

Red Arrow says it will halt intrastate Texas service 40

Court rules against Kentucky flat tax 40

Labor costs, particularly for small truckers, will be under intense pressure from a variety of directions in the coming years, labor experts warn.

Only part of the pressure will come from higher wages, they say. Many of the added costs will come from pressures on employers to increase costly benefits. Higher wages and benefits are inevitable because of the driver shortage and a new Teamster contract for organized trucking firms. The situation doesn't paint a rosy picture for smaller trucking companies.

Collective bargaining between the trucking companies and the Teamsters Union is due to wind up this month. Whether the two major employer bargaining groups—Trucking Management Inc. (TMI) and Regional Carriers Inc. (RMI)—can hold down the added costs in a new three-year National Master Freight Agreement is problematical.

Teamster president Jackie Presser is playing almost no role in the negotiations. His racketeering trial in Cleveland has been postponed again on the grounds that failing health prevents him from supervising his defense. He did not appear at the opening of the negotiations in February.

Labor costs now account for more than 60% of unionized carriers' operating expenses. In addition to minimal wage increases—the final item to be negotiated as the talks wind up this month—trucking employer groups are seeking rollbacks in several areas in an effort to hold down costs. Non-wage items are flexible workweeks, more freedom to substitute rail service for over-the-road operations, and greater freedom to use casual and part-time workers.

Union members have traditionally been leery of having special or "sweetheart" contracts signed with some weaker companies, but many of the unionized carriers have been hurt by non-union competition.

In addition, special local work rules in the agreement's 31 geographical supplements are being sought by employers to permit flexible work weeks for union workers and to permit casual workers to be hired in four-hour shifts, rather than eight-hour shifts.

Non-union truckers have wage and benefit costs that are about 20% to

Continued on page 24

Mandated benefits may severely hurt small fleets

Continued from page 20

30% less than their unionized competition. But this could change, labor experts warn.

There is growing pressure on federal and state lawmakers to mandate employers to provide fringes such as life and health insurance, pensions and death benefits. These benefits already cost business a record 39.3% of payroll, according to the U.S. Chamber of Commerce.

It could get worse, according to a study by the Employee Benefit Research Institute (EBRI) of Washington. Several presidential candidates have already announced their support for policies requiring employers to provide employees health insurance—the subject of legislation pending in Congress, EBRI notes.

With current deficit problems, "members of Congress do not have any Treasury funds to spend and so they will spend the funds of business," says Rep. Rod Chandler (R-Wash.).

The EBRI study also points out that legislation requiring employers to provide unpaid leave either for the birth, adoption or serious illness of a child, or for the serious illness of an elderly parent or the employee, is pending.

The study notes this observation by economist Kenneth McLennan: "Additional mandated benefits will make it more difficult for U.S. businesses to compete in international markets" and may cause some employers to reduce wages or other benefit programs, or even eliminate jobs, in an attempt to remain competitive.

It also quotes Dr. Olivia Mitchell, who claims the impact of government-ordered benefits "will be more pronounced on small employers who have less flexibility to rearrange compensation packages. As a result, small employers face greater competitive pressures because of their inability to deflect rising labor costs."

One source in the study recommends a national health insurance program financed by taxes on individual incomes rather than a "hidden" tax on employment.

The U.S. Chamber study says the largest fringe benefit cost for employers (26% of total benefits) was for paid time off, followed by Social Security (22.6%), medical-related benefits (21.1%), retirement (17%) and life insurance and death benefits (1.3%).

Another development puts additional financial strain on some weak companies. The U.S. District Court for Massachusetts recently held that an employer is responsible for minimum funding contributions to pension plans during a bankruptcy proceeding, and that certain amounts owed to the plan must be paid as a priority claim.

General counsel Gary Ford of the federal Pension Benefit Guaranty Corp. (PBGC) commented: "The fact that an employer is in bankruptcy does not lessen an employer's responsibility to make contributions to a pension plan"—a position the PBGC has long held.

The PBGC sets interest rates to be charged by multi-employer pension plans (such as the Teamsters' plan) on withdrawal liability payments that are overdue or in default. Currently, the rate is 8.75%. PBGC also increased its rate for pension guarantee premiums from $8.50 to $16 for each employee. □

Circle Express and Roadrunner announce merger

Indianapolis, Ind.—Circle Express Inc. and Roadrunner Enterprises Inc., Albuquerque, N.M., have signed a merger agreement. Combined annual revenues for 1988 are projected to exceed $300 million.

This is the second acquisition Circle has made in three months. In December, it bought C.I. Whitten Transfer, an explosives hauler.

Circle has purchased 1.35 million shares of Roadrunner stock at $9.75 per share from Donald F. Jones, former chairman and current member of the board of Roadrunner, and Jeffrey B. Martin, chairman, president and chief executive officer.

The purchases give Circle Express over 36% of the common stock of Roadrunner.

Under the agreement, Circle Express will purchase in cash all outstanding shares of Roadrunner stock at $9.75 per share.

Arthur L. Belford, chairman, president and CEO of Circle Express, said Roadrunner, which is publicly traded, would give Circle more access to western and southwestern markets.

Likewise, Roadrunner president, Jeff Martin, said Roadrunner had been seeking expansion opportunities in the East and Southeast, which Circle will provide.

Both Circle Express and Roadrunner are national truckload common carriers. Circle is a holding company for nine full truckload motor carriers, many involved in specialized transportation services like flatbed hauling, refrigerated transportation and explosives movements. □

Burnham Service Corp. acquired by Investcorp

Burnham Service Corp., Columbus, Ga., has accepted the acquisition bid of its management in conjunction with Investcorp International Inc.

Investcorp is an investors group involved in corporate acquisitions and real estate development projects in the U.S. and Europe since 1984.

Originally, Investcorp offered $18 a share for Burnham's stock. After Roadway Services, parent of Roadway Express Inc., offered $20 a share for Burnham, Investcorp increased its offer to $22 a share.

Burnham, which began as a household goods hauler, now specializes in the transportation of high value electronic equipment. □

Volvo GM will be third in heavy truck market, Berggren says

"One of every six heavy trucks produced in 1988 will be from Volvo GM Heavy Truck," said Thage Berggren, president and chief executive officer of Volvo GM.

The company, a joint venture between AB Volvo of Sweden and General Motors Corp., began operations Jan. 1, 1988.

"We intend to solidify our position as Number Three in the industry before the end of 1988. We anticipate that we will end up with about a 16.5% share of the market," said Berggren.

He said he expects 1988 sales of Volvo GM trucks to be 20,000 to 21,000, amounting to about $1.2 billion.

"In a year of many distractions, we managed to equal – almost – our 1986 retail sales," said Berggren. Volvo White's Class 7 and Class 8 unit sales for 1987 totaled 12,513, 307 units fewer than 1986's total of 12,820.

The company's market share of Class 8 trucks also decreased in 1987.

In 1986, the company sold 11,361 heavy trucks and captured 10.1% of the Class 8 market. In 1987, Volvo White Truck Corp. captured 8.3% of the Class 8 truck market, with reported retail sales of 10,840. Class 8 trucks, the largest and heaviest manufactured, have a gross weight of 33,001 or more.

Class 7 retail sales of Volvo White trucks increased by 214 units from 1986 to 1987, with 1,673 units sold in 1987. Gross vehicle weight for Class 7 trucks ranges between 26,001 and 33,000 lb.

Three factors caused the company's market share to dip slightly, said Berggren. "Most important was that industry sales were up so strongly over 1986. Volvo White could not increase production significantly despite scheduling 17 days of overtime at our Dublin, Va., assembly plant.

"In addition, the company supplied 750 U.S.-manufactured trucks to Volvo GM Canada Heavy Truck Corp., thus cutting into the supply available to the U.S. market," said Berggren.

According to Terry C. Young, director of marketing, "Volvo White penetrated the market last year 8.3% and GMC penetration was 5.6%. Putting these two numbers together gives you total vehicle sales of 18,148 or 13.9% share. That is within 120 units of Mack, which ended '87 at 13.9% [see chart]. We feel very good about the opportunity we have going forward to improve Volvo GM Heavy Truck's position in the overall marketplace."

Retail sales for the Class 8 truck industry for 1987 were 131,156. That is a 16.2% increase over 1986's figure of 112,871, according to Berggren.

The industry rankings for heavy-duty trucks in 1987 were, Berggren said:

Rank	Company	# of units	Market share
1.	Navistar	28,914	22.0%
2.	Freightliner	23,350	17.8%
3.	Mack	18,268	13.9%
4.	Kenworth	14,018	10.7%
5.	Ford	12,796	9.8%
6.	Peterbilt	12,578	9.6%
7.	Volvo White	10,840	8.3%
8.	General Motors	7,308	5.6%
Others totaled 2.3% of the market			

Heavy shipping container problems discussed

From CCJ's Washington Bureau

Overweight shipping containers that cause many problems for truckers are finally being discussed by representatives of shipping lines, port authorities, shippers and the American Trucking Associations (ATA). In February, they met at the request of the National Association of Stevedores to try to solve the problem, which often results in fines for truckers handling overweight ship containers.

Trucking interests maintain that they cannot refuse the unweighed containers because of competitive pressures.

Thomas D. Wilcox, executive director and general counsel of the stevedore group, said he called the meeting to develop a solution before the federal government steps in.

Truck drivers – often independent owner operators – are being fined by police who find the truck drivers hauling a ship container that's either overweight or loaded so that it cannot meet axle weight or bridge limits.

Inbound containers are a major problem at ports on all coasts. There also are problems with outbound containers that are transported most of the way by rail, but must complete the journey to the docks by truck.

Lana Batts, ATA vice president for policy, was slated to be a principal spokesperson for truckers at a March 3 meeting of the group. ATA maintains that incoming containers should be weighed at the port on the type of scales used at highway weigh stations, which show weight per axle as well as gross vehicle weight.

Port officials complain that the cost of purchasing and operating such scales is almost prohibitive at ports that often handle a thousand or more containers a day. But cheaper, lighter portable scales would not handle the volume they say.

The representatives also are considering what to do with overloaded containers, or those loaded so that axle weight limits are violated.

Trucking interests say they can identify U.S. shippers who overload or badly load containers and have some control over the violators.

Foreign shippers are harder to control, they say, and would have to be penalized in this country for their loading errors. □

Wrangling over federal hazmat regulations continues

From CCJ's Washington Bureau

There is still disagreement within the trucking and shipping industries over how hazardous materials regulations should be applied. But there is a general consensus that the federal government should set uniform rules rather than permit each state to draft its own regulations.

The American Trucking Associations (ATA) and its affiliated National Tank Truck Carriers won an initial victory when the U.S. Department of Transportation ruled that "virtually all" of New York City's hazmat regs are "inconsistent with the [federal] Hazardous Materials Transportation Act... and regulations and, therefore, are preempted..."

The challenge was brought because the city's regulations increased people's exposure to hazardous materials when cargo had to be transferred to small vehicles that meet city requirements, but are illegal elsewhere and considered unsafe, according to ATA president Thomas Donohue.

However, the issue awaits a final court decision in a case brought by ATA and the National Paint & Coatings Association.

Transportation secretary James Burnley has said that he favors a case-by-case approach to federal preemption of hazardous materials regulation by the states. In a recent interview he said: "Leaving the issue entirely to the states is not the right answer; absolute federal preemption, broad-brush, is not the right answer; sorting it out case-by-case is the right answer, but it is messy and it takes more time."

Disagreement over how to implement hazmat regulations still exists between the National Private Trucking Association and its former umbrella group, ATA.

For example, a DOT proposal to require placing emergency guidebooks in tractor cabs used to haul hazmat materials is favored by the private carrier group, but the guidebook is not needed in cabs, according to ATA and its Regular Common Carrier Conference.

Both groups, however, favor that part of the proposal by the DOT's Research and Special Projects Administration that would require additional emergency response information be included on shipping papers.

ATA says truck drivers are not "emergency response" personnel and, therefore, shouldn't carry the guidebook in their cabs. Some 1.5 million copies of the book have already been distributed to emergency responders, according to John V. Currie, ATA safety director.

But the private carrier group contends that the book should be required in truck cabs because truck drivers, as well as passersby, "are without essential information concerning the risks which the materials being transported may pose to them and the public generally, or how to provide immediate and effective first aid, should contact with a material [have] occurred."

ATA also is opposing a DOT proposal that would require immediate notification to the National Response Center in the event of evacuation or if a transportation facility closes for more than an hour because of an incident. The proposal is unnecessary and unworkable, ATA told DOT. □

1987 retail truck sales set record, says MVMA

Retail truck sales of 4.2 million units by franchised dealers of U.S. truck manufacturers set a record for 1987, according to preliminary figures released by the Motor Vehicle Manufacturers Association. The previous record of 4 million units was set in 1986. Sales for the 1987 calendar year were up 3.5% from 1986. □

Preliminary New Truck Retail Sales by Gross Vehicle Weight (Including Imports of U.S. Manufacturers)

Class	Calendar Year 1987	1986	1987/1986 % change
I (0 to 6,000 lb)	2,696,127	2,541,128	+6.1
II (6,001 to 10,000 lb)	1,175,080	1,213,664	-3.2
III (10,001 to 14,000 lb)	13,934	11,558	+20.6
IV (14,001 to 16,000 lb)	2,129	—	—
V (16,001 to 19,500 lb)	8,198	5,905	+38.8
VI (19,501 to 26,000 lb)	44,206	44,796	-1.3
VII (26,001 to 33,000 lb)	102,317	100,713	+1.6
VIII (33,001 lb & over)	130,521	112,871	+15.6
TOTAL	4,172,512	4,030,635	+3.5

Firms celebrate birthdays

The Mashburn Companies, super-heavy trucking and rigging specialists, are in their 75th year in business.

The Childress, Tex., firm now has four subsidiaries. They are National Rigging, Lone Star Trailers, Mashburn Trucking and Lone Star Cranes.

Fifty years ago, Williams Control began to manufacture a unique air brake control valve.

The company is now part of Dana Corporation's Precision Controls Divison. Williams manufactures and markets air-related control devices and exhaust brakes for trucks and buses. □

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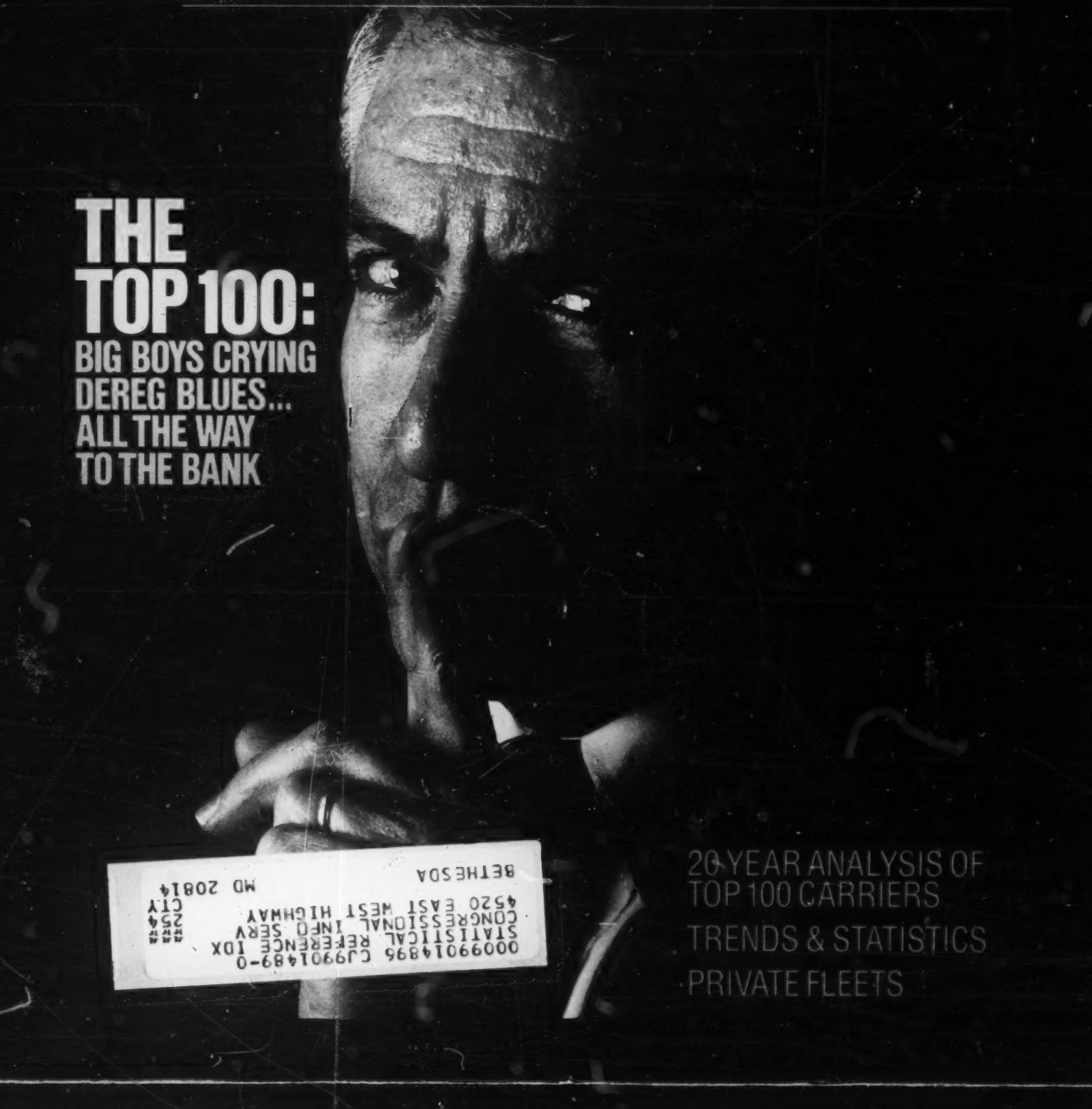

THE TOP 100: BIG BOYS CRYING DEREG BLUES... ALL THE WAY TO THE BANK

20-YEAR ANALYSIS OF TOP 100 CARRIERS

TRENDS & STATISTICS

PRIVATE FLEETS

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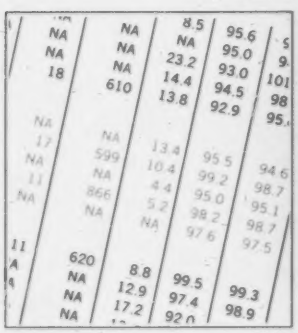
TABLE OF CONTENTS

FEATURES	The Top 100 Big Boys cry the dereg blues....all the way to the bank	82
	Industry Trends and Statistics Forecast of equipment sales; 1987 production data	97
	Private Fleets Listed by vocational group; segmented by vehicle type	105
	20-Year Analysis of the Top 100 Carriers Big Four's revenues and profits increased significantly	122
COLUMNS	Editorial / The heart of trucking, Part IV: Prognosis	9
	Productivity / Incentive programs for all employees	72
	Safety / Fleet safety audit is offered by ATA	74
	Technology / Would you believe an electronic muffler?	76
	Washington Report / Everyone pays for social programs	78
DEPARTMENTS	Up Front	12
	Industry and Washington News	16
	Laugh It Off	64
	Fleet Forms	66
	Coming Events	68
	Classified Advertising	158
	Advertisers' Index	160
	Truck Talk	161
PRODUCTS	New Products And Services	128
	Publications	157
POSTCARDS	Truck Talk and Reader Service Cards	143
	Subscription Cards	145



Page 82

Page 122

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IN THE NEXT ISSUE

Lasers can cut your tire costs! Many tandem suspensions loosen within a few thousand miles, allowing one or both axles to shift. A ½-in. mis-alignment of a tractor tandem, for example, easily can trim 30% off the life of radial steer tires and reduce the longevity of drive tires by 20%. For that reason, many fleets are using fast-acting laser aligners to check tandems on a scheduled basis, as detailed by CCJ's cover feature.

The August issue also will include a product review of 5th wheels. In addition to spec'ing information, there will be a comparison chart noting various 5th wheels' most important features.

Another story will discuss equipment life-cycle costing, based on insights offered by John Dolce, a highly regarded transportation manager. □

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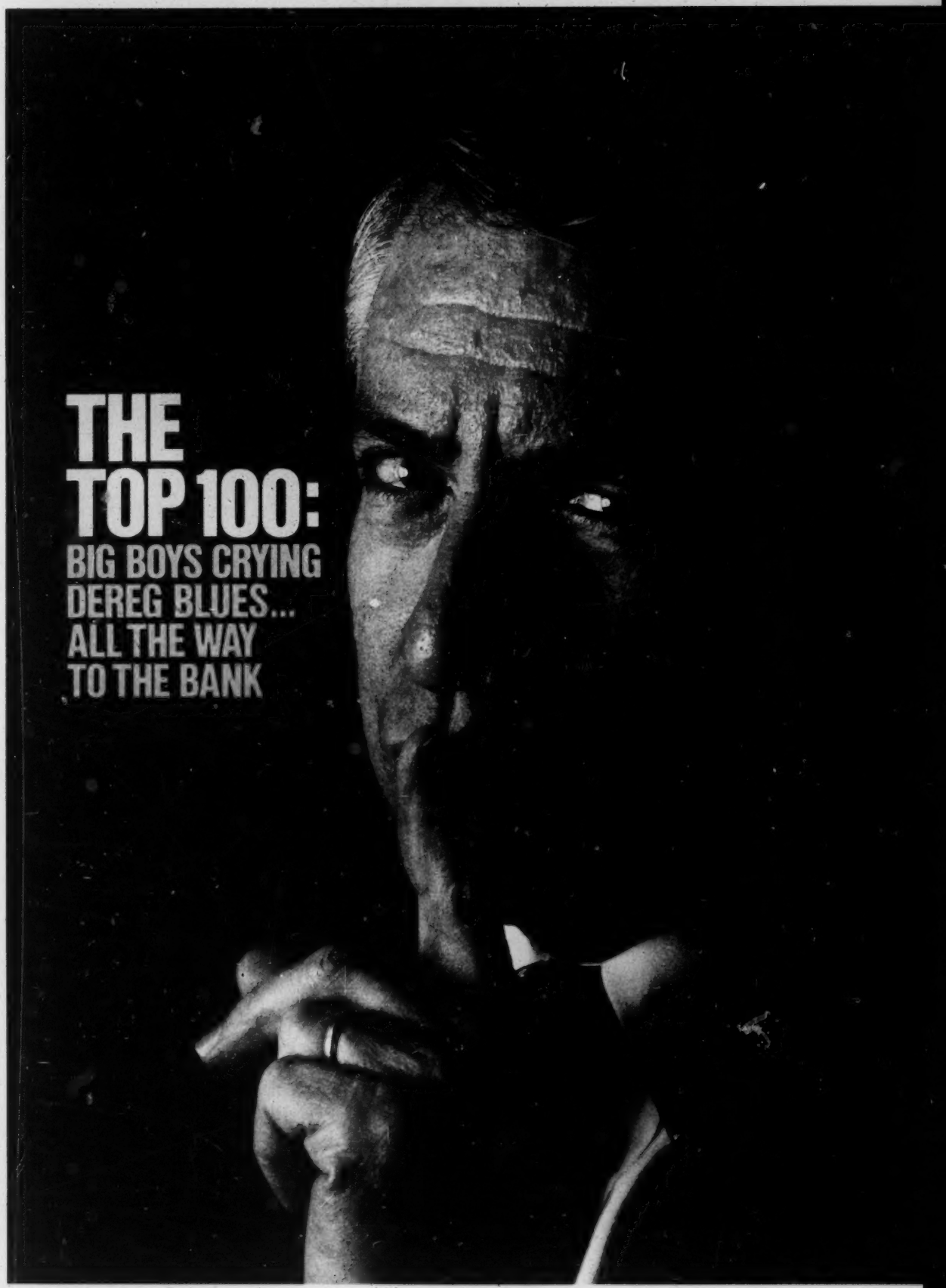


THE TOP 100: BIG BOYS CRYING DEREG BLUES... ALL THE WAY TO THE BANK

While the Top 100's gross revenue increased 4.8% and total mileage was up 4.5%, compared to the previous year, total expenses shot up 8.4%. As a result, 1987's net operating income—$480.6 million—was 51% lower than the previous year.

By **PARRY DESMOND**, *Executive Editor*

"Them that has gets." That adage prevailed for the trucking industry's four biggest revenue-producing fleets, even though a majority of the Top 100 common carriers' earnings declined in 1987 which was the worst profit-year since 1983.

The four big boys that have dominated CCJ's Top 100 since it was established 20 years ago, and their gross revenue and net operating income last year, are:

- United Parcel Service (the combination of the two corporate entities), Greenwich, Conn., $8.0 billion and $329.4 million;
- Yellow Freight, Overland Park, Kan., $1.7 billion and $73.2 million.
- Roadway Express, Akron, Oh., $1.6 billion and $86.5 million;
- Consolidated Freightways, of Portland, Ore., $1.5 billion and $76.7 million.

New Penn Motor Express, the Lebanon, Pa.-based regional LTL fleet, had the lowest OR—82.0—last year.

As a group, the four captured 40% of the Top 100's $28.2 billion in sales and 48% of the total profits last year.

LTL tonnage totals for the Big Three fleets were: Yellow, 5.6 million, up 16.7%; Roadway, 4.9 million, up 11.4%; and Consolidated Freightways, 4.5 million, up 9.8%.

And the fleets whose 1987 revenues placed them in the first 10 positions garnered 60% of the Top 100's total profits.

As noted in the article entitled "20 Year Analysis of the Top 100," which begins on page 122, UPS, Roadway, Consolidated Freightways and Yellow have had a significant chunk of the Top 100 revenues and profits over the past two decades. Despite their historical dominance in profit volume, however, all four industry leaders suffered reduced net income last year.

While the Top 100's gross revenue increased 4.8% and total mileage was up 4.5%, compared to the previous year, total expenses shot up 8.4%. As a result, 1987's net operating income—$480.6 million—was 51% lower than the previous year.

And the Top 100's average operating ratio (OR) shot up to 96.5 last year from 93.2 in 1986.

To gain a perspective on how the Top 100 matches up with the industry as a whole, see "Selected Financial Data From Class I and Class II Common Carriers," page 98. According to that information, the truckers' gross revenues increased 4.9% and expenses were up 7.7% last year. That resulted in a 96.7 OR for the industry, compared to 94.2 in 1986. And post-tax net income declined by 50.6%.

Big revenue gainers

Whiteford Truck Lines, South Bend, Ind., made the biggest revenue gain on the Top 100 listing for 1987. It moved to the 42nd ranking

Text continues on page 88

(all dollar amounts in thousands

1987 Revenue Rank	Fleet Name, City, State	Carrier Type	1987 Gross Revenues	1986 Gross Revenues	1986 Revenue Rank	Operating Ratio			
						1987	Rank	1986	Rank
1	UNITED PARCEL SVC INC, GREENWICH, CT	CMGF	$5828293	$5334812	1	94.3	T34	89.4	13
2	UNITED PARCEL SVC INC, NY, GREENWICH, CT	CMGF	2220415	2037490	2	100.0	75	93.2	34
3	YELLOW FRT SYSM INC, OVERLAND PARK, KS	CMGF	1740696	1619175	3	95.8	45	91.5	19
4	ROADWAY EXPRESS INC, AKRON, OH	CMGF	1596304	1499179	4	94.6	37	90.3	16
5	CONSOLIDATED FRTWYS CORP DEL, PORTLAND, OR	CMGF	1555217	1467329	5	95.1	39	92.1	23
11	UNITED VAN LINES INC, FENTON, MO	CMHG	419414	394225	11	100.9	77	99.1	86
12	ANR FREIGHT SYSTEM INC, DENVER, CO	CMGF	405920	397439	12	103.1	86	99.9	93
13	ALLIED VAN LINES INC, BROADVIEW, IL	CMHG	382738	376907	13	99.1	67	100.1	94
14	AMERICAN FRT SYSTEM INC, OVERLAND PARK, KS	CMGF	353549	300569	19	107.1	94	97.7	74
15	TRANSCON LINES, EL SEGUNDO, CA	CMGF	333758	343553	15	103.3	T87	96.9	65
21	CENTRAL TRANSPORT INC, STERLING HTS, MI	CMGF	281908	240296	22	97.6	T56	96.6	62
22	SIGNAL DELIVERY SERVICE, DOWNERS GROVE, IL	CTRS	232276	218446	23	97.5	55	91.9	20
23	SCHNEIDER NAT'L CARRIERS INC, AURORA, IL	CMSC	229458	205277	24	101.9	T79	98.0	75
24	COMPLETE AUTO TRANSIT, BLOOMFIELD HILLS, MI	CMMV	234777	241693	21	93.0	T24	91.3	18
25	BEKINS VAN LINES CO, HILLSIDE, IL	CMHG	216723	197550	27	99.8	71	99.0	84
31	VIKING FREIGHT SYS INC, SAN JOSE, CA	CMGF	185950	170885	36	95.7	44	93.9	38
32	BUILDERS TRANSPORT, CAMDEN, SC	CTGF	185258	106407	52	92.7	T21	92.2	24
33	ATLAS VAN LINES INC, EVANSVILLE, IN	CMHG	184754	180014	33	94.2	T30	93.2	T35
34	BOWMAN TRPTN INC, ATLANTA, GA	CMGF	183694	179776	34	102.7	84	97.2	68
35	BROWN TRANSPORT CORP, ELBERTON, GA	CMGF	179078	189745	29	101.9	T79	94.2	40
41	NATIONAL FREIGHT, VINELAND, NJ	CMGF	137344	132342	39	97.6	T56	96.2	60
42	WHITEFORD TRUCK LINES, SOUTH BEND, IN	CMGF	137010	57679	96	93.8	28	99.9	92
43	THURSTON MOTOR LINES INC, CHARLOTTE, NC	CMGF	136880	143703	37	109.9	97	100.3	95
44	RYDER FREIGHT SYSTEM INC, SALT LAKE CITY, UT	CMGF	133983	131023	40	107.7	95	104.8	98
45	NORTHWEST TRPT SERVICE INC, COMMERCE CITY, CO	CMGF	131933	110424	49	91.6	18	87.3	6

For Top 100 listings under "Type": BM-building materials; CM-common; CT-contracts; GF-general freight; ED-explosives/dangerous articles; FP-forest products; HG-household goods; HM-heavy machinery; LP-liquid petroleum products (included, in most cases, other bulk commodities); MV-motor vehicles; RS-retail store delivery; SC-specific commodity not otherwise grouped.

T – Tie in operating ratio **NR** – Not ranked

(all dollar amounts in thousands)

1987 Revenue Rank	Fleet Name, City, State	Carrier Type	1987 Gross Revenues	1986 Gross Revenues	1986 Revenue Rank	Operating Ratio			
						1987	Rank	1986	Rank
51	CHURCHILL TRUCK LNS INC, CHILLICOTHE, MO	CMGF	108779	97528	56	97.8	58	94.8	43
52	OLD DOMINION FRT LINE INC, HIGH POINT, NC	CMGF	106324	104499	53	99.9	T72	99.6	91
53	TRI-STATE MTR TRANSIT, JOPLIN, MO	CMHM	103186	115735	47	102.0	81	95.3	48
54	SOUTHEASTERN FRT LNS INC, COLUMBIA, SC	CMGF	101860	88953	64	9[illegible]	36	89.0	12
55	E&L TRANSPORT CO, DEARBORN, MI	CMMV	97372	93193	59	9[illegible]	T69	98.0	76
61	CRETE CARRIERS CORP, LINCOLN, NE	CMGF	89008	83092	67	94.3	T34	96.0	58
62	KOCH SERVICE INC, WICHITA, KS	CMLP	88059	91158	60	84.2[illegible]	2	88.7	11
63	FFE TRPTN SVSC INC, DALLAS, TX	CMRC	83261	90066	61	96.4	49	98.3	80
64	CONTRACT FREIGHTERS INC, JOPLIN, MO	CMSC	82039	73755	71	88.4	10	90.6	17
65	JACK COOPER TRPT CO INC, OKLAHOMA CITY, OK	CMMV	79825	103177	54	99.0	66	95.9	55
71	ANDERSON TRUCKING SERVICE, ST CLOUD, MN	CMSC	74720	71032	75	96.5	50	96.1	59
72	JONES MTR CO INC, SPRING CITY, PA	CMGF	74601	83270	66	98.9	65	98.2	77
73	DART TRANSIT COMPANY, ST PAUL, MN	CMGF	73693	70434	77	91.9	19	93.1	32
74	HYMAN FREIGHTWAYS INC, ST PAUL, MN	CMGF	73533	61891	87	98.7	T63	99.2	88
75	COUNTRY WIDE TRUCKS SVC, CUCAMONGA, CA	CMGF	72664	56583	99	93.0	T24	93.0	30
81	MIDWESTERN DISTB INC, FORT SCOTT, KS	CMSC	68465	79244	69	103.5	89	107.6	99
82	GROENDYKE TRPT INC, ENID, OK	CMLP	67453	60272	92	98.3	61	97.4	71
83	NATIONAL CARRIERS INC, LIBERAL, KS	CMRC	67327	62025	86	96.8	52	95.5	50
84	CASSENS TRANSPORT CO, EDWARDSVILLE, IL	CMMV	67218	67696	81	99.9	T72	95.6	51
85	MILLER TRANSPORTERS INC, JACKSON, MS	CMLP	66936	63526	84	95.2	40	94.5	42
91	DALLAS & MAVIS FWDG CO, KENOSHA, WI	CMMV	65024	42346	NR	94.2	T30	96.0	NR
92	AUTO CONVOY CO, DECATUR, GA	CMMV	64722	67346	79	104.5	91	98.4	81
93	LYONS TRPTN LINES INC, ERIE, PA	CMGF	63733	60833	91	102.8	85	99.5	90
94	CONVOY CO, PORTLAND, OR	CMMV	62637	61929	88	99.7	T69	95.0	T44
95	SAIA MOTOR FRT LN INC, HOUMA, LA	CMGF	62586	55175	NR	86.9	T6	88.4	NR

	Gross Revenue	Expenses	Post Tax Net Income
TOTAL TOP 100-1987	$28,155,417	$27,157,323	$480,580
TOTAL TOP 100-1986	$26,898,993	$25,083,023	$943,215
TOTAL TOP 100-1985	$25,016,054	$23,594,793	$734,023

(all dollar amounts in thousands)

1987 Revenue Rank	Fleet Name, City, State	Carrier Type	1987 Gross Revenues	1986 Gross Revenues	Operating Ratio	
					1987	1986
101	FLEET TRANSPORT CO INC, CLEVELAND, OH	CMLP	61890	55149	103.7	96.8
102	GLOBAL VAN LINES INC, ORANGE, CA	CMHG	61044	52735	98.3	100.5
103	MERCER TRPTN CO, LOUISVILLE, KY	CMBM	60256	57071	95.4	95.5
104	LEASEWAY MOTOR CAR TRANSPORT, BIRMINGHAM, MI	CMMV	60187	47518	101.6	98.4
105	PRE-FAB TRANSPORT CO, FARMER CITY, IL	CMBM	58654	54881	99.6	96.8
111	DEATON INC, BIRMINGHAM, AL	CMSC	55687	53126	93.4	92.1
112	WILSON TRUCKING CORP, FISHERVILLE, VA	CMGF	55456	51767	88.0	86.6
113	DSI TRANSPORTS, INC, DEER PARK, TX	CMSC	55245	51217	91.4	89.5
114	ECK MILLER TRPTN CORP, ROCKPORT, IN	CMGF	54917	61133	98.6	97.6
115	ROBERTS EXPRESS INC, AKRON, OH	CMGF	54556	41103	87.7	90.2
121	KENOSHA AUTO TRPT CORP, KENOSHA, WI	CMMV	51771	55367	97.6	97.5
122	McGIL SPECIALIZED CRRS, MARIETTA, GA	CMSC	51285	50152	97.4	98.1
123	RISS INTERNAT'L CORP, KANSAS CITY, MO	CMGF	51254	55399	97.7	98.5
124	MAY TRUCKING CO, PAYETTE, ID	CMGF	49851	44266	97.8	95.6
125	DAILY EXPRESS INC, CARLISLE, PA	CMSC	49728	53534	95.5	95.1
131	WILLIS SHAW FROZEN EXP, ELM SPRINGS, AR	CMRC	46922	48485	92.3	90.6
132	SHAFFER TRUCKING INC, NEW KINGSTOWN, PA	CMSC	46913	42567	91.0	87.6
133	COMMERCIAL CARRIERS CORP, AUBURNDALE, FL	CMSC	46027	49175	94.1	88.1
134	McKENZIE TANK LNS, TALLAHASSEE, FL	CMLP	45858	46363	94.9	89.5
135	MALONE FREIGHT LNS, BIRMINGHAM, AL	CMGF	45674	31640	98.7	100.2
141	SCHWERMAN TRKG CO, MILWAUKEE, WI	CMSC	43687	45898	95.1	94.7
142	CONWAY EASTERN EXPRESS, PORTLAND, OR	CMGF	42649	42355	115.8	103.2
143	COLONIAL FRT SYSTEM INC, KNOXVILLE, TN	CMGF	42242	42917	96.4	97.7
144	ARMELLINI EXPRESS LNS, PALM CITY, FL	CMSC	42085	35773	97.2	94.5
145	DI SALVO TRUCKING CO, SAN FRANCISCO, CA	CMGF	41346	41763	97.4	96.5

For Top 100 listings under "Type": BM-building materials; CM-common; CT-contracts; GF-general freight; ED-explosives/dangerous articles; FP-forest products; HG-household goods; HM-heavy machinery; LP-liquid petroleum products (included, in most cases, other bulk commodities); MV-motor vehicles; RS-retail store delivery; SC-specific commodity not otherwise grouped.

(all dollar amounts in thousands)

1987 Revenue Rank	Fleet Name, City, State	Carrier Type	1987 Gross Revenues	1986 Gross Revenues	Operating Ratio	
					1987	1986
151	SCHEDULED TRKWYS INC, ROGERS, AR	CMGF	39681	69695	112.4	107.2
152	SHANNO TRPTN INC, W ST PAUL, MN	CMGF	39639	37786	95.0	94.6
153	SAM TANKSLEY TRKG INC, CAPE GIRARDEAU, MO	CMGF	39297	38668	102.7	96.3
154	AAA TRUCKING CORP, TRENTON, NJ	CMGF	39233	37208	106.9	106.9
155	LENERTZ INC, S ST PAUL, MN	CMGF	39063	36631	97.2	96.4
161	GLENN McCLENDON TRKG CO, LAFAYETTE, AL	CMGF	36776	34238	98.6	92.5
162	SMALLEY TRPTN CO, TAMPA, FL	CMGF	36647	28399	96.8	95.4
163	WILEY SANDERS TRK LNS, TROY, AL	CMSC	36504	39506	91.3	93.3
164	GEORGE TRANSFER INC, PARKTON, MD	CMSC	36315	33055	96.3	102.5
165	PLOOF TRUCK LINES INC, JACKSONVILLE, FL	CMBM	36045	36606	85.0	82.3
171	SMITHWAY MTR XPRESS INC, FORD DODGE, IA	CMBM	34736	32579	97.6	96.7
172	THE MICKOW CORP DES MOINES, IA	CMSC	34240	30438	97.5	99.1
173	BULKMATIC TRPT CO, CHICAGO, IL	CMSC	33687	24000	94.9	91.8
174	TLC LINES INC, FENTON, MO	CMGF	33606	32697	96.3	97.7
175	UMTHAM TRKG CO, EAGLE GROVE, IA	CMBM	33466	30063	95.9	96.8
181	REDWING CARRIERS INC, TAMPA, FL	CMLP	31320	28480	98.0	99.7
182	RW SERVICE SYSTEM INC, TAYLOR, MI	CMGF	31145	33014	102.7	97.2
183	MOTOR CARGO, N SALT LAKE, UT	CMGF	30664	27482	88.8	87.3
184	ACME TRUCK LN INC, HARVEY, LA	CMSC	30651	28777	95.2	102.6
185	BULLDOG TRKG-GA INC, CARNESVILLE, GA	CMGF	30488	15555	84.2	80.0
191	COORS TRPTN CO, WHEATRIDGE, CO	CMRC	29166	31187	99.2	105.4
192	COOPER MTR LINES INC, GREENVILLE, SC	CMGF	29050	27232	94.0	93.2
193	SAMMONS TRUCKING, MISSOULA, MT	CMBM	28911	33747	99.3	97.8
194	H&W MOTOR EXP CO, DUBUQUE, IA	CMGF	28735	27649	95.6	100.3
195	IVORY INC, ROCKPORT, IN	CMGF	28622	29426	100.1	99.4

with $137 million in revenue last year from the 96th spot based on $57.7 million in 1986.

And KLLM Inc., Jackson, Miss., also had a significant leap forward, moving up to the 70th position—based on $75.2 million—from the No. 95 spot with $58.1 million.

Another big gainer was Country Wide Truck Service, Cucamonga, Calif. The high-service, irregular-route truckload operation jumped to the 75th spot, based on $72.7 million in revenue, from 99th on last year's list, with $56.6 million.

With $18.5 million in revenues last year, 25-year-old Builders Transport moved up to the 32nd slot on the list. In 1986, the Camden, S.C.-based truckload operation was No. 52 with $10.6 million.

Lowest OR

New Penn Motor Express, the Lebanon, Pa.-based fleet that offers overnight less-than-truckload service in the Middle Atlantic and New England states, had the lowest OR—82.0—last year. In 1986, New Penn's 81.8 OR ranked third among the Top 100. New Penn's net profit margin was 10.17%.

J.B. Hunt Transport reported an 85.0 OR. But in 1986, reflective of how some carriers' profits diminished last year, the Lowell, Ark.-based truckload fleet had a 77.0 OR, the lowest of the Top 100. It's net profit margin was 9.07%.

Other carriers that had ORs under 85 in 1987, and their rankings for that category, include:

- Koch Service, Wichita, Kan., 84.2 (2), down from 88.7 (11) in 1986. Koch had a 8.95% net profit margin.
- Werner Enterprises, Omaha, Neb., 84.6 (3), up from 83.0 (2) in 1986. Werner had an 8.68% net profit margin.

Pilot Freight Carriers, Winston-Salem, N.C., had the Top 100's highest OR—113.1. Spartan Express, Greer, S.C., was next with a 110.6.

Twenty-five of the Top 100 carriers registered deficits in 1987. The previous year, only 12 fleets lost money. Largest losers were American Freight System, Overland Park, Kan., down $25.2 million, and Pilot Freight, off $21.9 million.

American Freight purchased ailing Smith Transfer of Staunton, Va., last June. Pilot Freight, formerly a subsidiary of TNT North America, was sold last fall to the Taggart Group, a New Brunswick, N.J.-based investment group.

Specialized carriers

Special commodity fleets mal ing the Top 100 included:

- Matlack, of Wilmington, Del ($204.3 million) edged Chemic Leaman Tank Lines, Lionville, Pa ($202.4 million) as the leading bul carriage revenue producer. Hov ever, Chemical Leaman (97.2) ha a lower OR than Matlack (98.6).
- Anchor Motor Freight, of Bi mingham, Mich., had the most rev enue—$28.6 million among the c carriers. Complete Auto Transi Bloomfield Hills, Mich., with $23 million, was second.
- FFE Transportation, Dalla Tex., had the most reefer revenu with $83.3 million.
- North American Van Line Fort Wayne, Ind., led the hous hold goods fleet revenue rankin by a wide margin. North Amer can's $79 million easily outdi tanced the $41.9 million registere by United Van Lines, Fenton, M

Leaders of 101-200 group

Bulldog Trucking had lowest O (84.2) and highest revenue growt rate (+96%) among the 101-2(ranked carriers. The Carnesvill Ga. carrier did that by nearly do bling its 1986 gross to $30.5 mi lion.

Other big revenue gainers amor the second 100 were:

- Intermodal Transportation Se vice, Cincinnati, Oh., up $16.3 m lion to $53.5 million.
- The OK Trucking Co., Cinci nati, Oh., a $15.7 million increa to $47.4 million.
- Donco Carriers, Oklahoma Cit Okla., a $15.4 million gain to $55 million.

On the downside, the revenue Scheduled Truckways plummet from $69.7 million in 1986 $39.7 million last year. The Ro ers, Ark. fleet had a 112.4 OR 1987. □

How reporting changes affect Top 100 data

Top 100 data is based on information filed with the Interstate Commerce Commission by Class I and II for-hire carriers. The statistics are compiled by the American Trucking Associations exclusively for CCJ.

In the past, CCJ extracted Top 100 data from the ICC annual report forms fleets sent to the commission. Since the ICC extended its 1988 filing deadline for the annual reports, Top 100 data had to be sourced from ICC report forms for the fourth quarter of 1987.

The data reported each quarter is cumulative, but those report forms don't include detailed information on fleets' equipment and maintenance activities.

In lieu of the equipment and maintenance data, significant financial data has been added this year to the charts for general freight carriers. However, the quarterly reports filed by special commodity fleets such as interstate haulers of automobiles, household goods, refrigerated items and liquid petroleum don't include detailed financial information.

Also, not all contract carriers are included in this year's rankings since they are not required by the ICC to file quarterly reports.

In addition to fleets that went out of business last year—e.g., Milne Truck Lines and CW Transport—several carriers that filed for bankruptcy this year—e.g., Overland Express and Southwest Motor Freight—did not report 1987 data to the ICC. And several fleets, including P.I.E. which ranked seventh in 1986, failed to file a report for the fourth quarter of 1987.

Top 100 and Trends & Statistics are available in a booklet for $5.00. Write or company letterhead to: Reprint Editor Commercial Carrier Journal, Chilton Way, Radnor, Pa. 19089.

LESS-THAN-TRUCKLOAD COMMON CARRIERS OF GENERAL FREIGHT

Fleet Name, City, State	Gross Revenues	Total Operating Expenses	Net Operating Income	Operating Ratio	Interest Expense	Other Income Adjustments	Income/ Deferred Taxes	Net Income
AAA COOPER TRPTN, DOTHAN, AL	$ 92113	$ 83262	$ 8851	90.4	$ 1562	$ 81	$ 49	$ 7321
ABF FRT SYSTEM INC, FORT SMITH, AR	526294	515857	10437	98.0	7597	(1653)	767	420
A-P-A TRANSPORT CORP, NORTH BERGEN, NJ	118918	110458	8460	92.9	1577	(927)	60	5896
ADVANCE TRPTN CO, MILWAUKEE, WI	76072	74121	1951	97.4	1586	1120	292	1193
AMERICAN FRT SYSTEM INC, OVERLAND PARK, KS	353549	378799	(25250)	107.1	589	(92)	(10638)	(15293)
CENTRAL FREIGHT LINES INC, WACO, TX	196170	181860	14310	92.7	1553	3457	5275	10939
CENTRAL TRANSPORT INC, STERLING HTS, MI	281908	275073	6835	97.6	553	4543	2748	8077
CHURCHILL TRUCK LNS INC, CHILLICOTHE, MO	108779	106327	2452	97.8	163	176	1170	1295
CON-WAY WESTERN EXPRESS, PORTLAND, OR	65992	57982	8010	87.9	409	[illegible]	3263	4343
CONSOLIDATED FRTWYS, PORTLAND, OR	1555217	1478501	76716	95.1	4596	2924	28783	46261
LYONS TRPTN LINES INC, ERIE, PA	63733	65489	(1756)	102.8	172	280	(4)	(1644)
MERCHANTS FAST MOTOR LNS, ABILENE, TX	76389	78223	(1834)	102.4	0	0	(734)	(1100)
NEW PENN MOTOR EXP INC, LEBANON, PA	95456	78284	17173	82.0	94	403	7770	9712
NORTHWEST TRPT SERVICE INC, COMMERCE CITY, CO	131933	120852	11081	91.6	40	1076	5237	6880
OLD DOMINION FREIGHT LN INC, HIGH POINT, NC	106324	106212	112	99.9	3918	(312)	6	(4124)
SAIA MOTOR FREIGHT LINE, HOUMA, LA	62586	54370	8216	86.9	5534	(374)	994	1314
SOUTHEASTERN FRT LINES, COLUMBIA, SC	101860	96112	5748	94.4	389	567	74	5852
SPARTAN EXPRESS INC, GREER, SC	62475	69110	(6635)	110.6	1152	180	(3137)	4470
ST JOHNSBURY TRKG CO, HOLLISTON, MA	284204	253895	30309	89.3	3105	(12166)	8141	6897
TNT HOLLAND MOTOR EXP INC, HOLLAND, MI	144014	126858	17156	88.1	43	(829)	8114	8170
VIKING FRT SYSTEM INC, SAN JOSE, CA	185950	178010	7939	95.7	1948	1108	2723	4376
WATKINS MOTOR LINES INC, LAKELAND, FL	145806	139323	6483	95.6	82	(3371)	1442	1588
WILLIG FREIGHT LINES, SAN FRANCISCO, CA	68629	63993	4636	93.2	1370	16	1090	2192
YELLOW FREIGHT SYSM INC, OVERLAND PARK, KS	1740696	1667456	73240	95.8	8710	(1123)	23208	40199
TOTAL - LTL GENERAL FREIGHT	$19804726	$19061580	$743146	96.2	$74494	$ (727)	$264118	$403807

(all dollar amounts in thousands)

Net Profit Margin, %	Salaries-Officers/ Supervisors	Salaries & Wages	Fringes	Maintenance/ Operating Supply/Exp.	General Supplies & Expenses	Operating Taxes & Licenses	Insurance	Communi-cation & Utilities	Depreciation & Asset Disposition	Equipment Rents/Purch. Transportation	Tons Carried
7.95%	$ 11489	$ 32850	$ 6467	$ 7579	$ 4968	$ 2819	$ 2754	$ 1810	$ 6630	$ 5894	749
.08	58917	212207	75154	41924	45960	21515	12226	10178	26930	10846	2404
4.96	11699	46219	14897	9473	12581	2343	4014	3417	4793	1022	665
1.57	6305	23838	11797	5560	3931	2513	2922	1329	1675	10252	678
(4.33)	32772	158245	54613	26798	54924	11473	8841	6161	8974	15998	2207
5.58	16342	92161	20327	16375	7943	8053	5055	2720	12108	776	2319
2.87	13104	34375	12041	3212	15511	4045	4814	1921	4843	181207	4665
1.19	11477	40112	13491	11708	5421	3731	1760	1899	4551	12177	661
6.58	8601	21488	6845	4970	5447	2211	2392	1179	3715	1133	419
2.97	160954	603181	234535	146730	77398	55546	42909	16675	74942	65631	6184
(2.58)	5476	22238	8490	5867	3458	1852	1794	1415	1714	13185	483
(1.44)	5733	31402	10756	6755	10169	3569	2058	1264	159	6358	913
10.17	7759	33270	13793	8498	3777	2594	2068	1260	4460	804	700
5.21	15111	42848	16057	10844	15508	4568	2469	1293	[illegible]	11762	669
(3.88)	10973	28404	6219	11099	7262	3811	6158	2144	4394	25748	1005
2.10	4567	20184	5611	4564	2590	2628	1668	1169	4790	6599	730
5.75	8587	45228	9809	9946	8220	3258	2757	1834	4535	1938	1055
(7.15)	10412	15766	4513	5479	6774	1738	2342	1911	4040	16134	655
2.43	20373	119448	41489	20408	15286	7061	5750	4791	4950	14338	1838
5.67	12499	55540	19103	12115	6204	4675	2808	1628	5395	6892	1253
2.35	18079	63447	17347	12656	17969	6339	8077	4581	9423	20091	1302
1.09	16296	29577	7472	8565	13048	2911	5223	3110	2669	50152	562
3.19	5633	26727	10085	7634	3231	3186	1716	837	3855	1090	539
2.31	175730	703681	260502	158153	92513	61161	43328	30914	100632	40842	6863
2.04%	$2166737	$7976293	$2766898	$1548568	$1296022	$505850	$420688	$324578	$713777	$1342165	85320

Vehicle Mileage	Vehicle Mileage (x000)				Average Haul (In Miles)	Line Haul Cost/ Mile	Tons Carried		Shipments Carried		Average Load (In Tons)
	Owned Vehicles	Leased Vehicles		Intermodal			LTL 000	TL 000	LTL 000	TL 000	
		w/Driver	w/o Driver								
23733	23733	0	0	0	245	$ .95	562	187	1343	18	7.2
188923	188917	5	0	2641	1158	1.01	1734	669	3725	71	14.5
18561	18561	0	0	0	207	.90	513	152	1562	13	7.4
17011	4286	231	12494	0	242	N/A	440	239	888	20	9.7
106885	89558	1023	16304	5040	607	1.10	1531	676	3487	57	12.0
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	4321	93	[illegible]
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	1432	91	[illegible]
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	1365	100	[illegible]
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	938	35	[illegible]
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	4247	59	[illegible]
53885	53885	0	0	713	216	.98	1147	1172	3031	79	9.1
103707	0	685	103021	0	158	2.18	1950	2715	3197	239	7.1
32942	28961	3981	0	1961	572	1.09	465	197	924	20	10.7
13255	12972	192	92	84	310	1.21	326	93	874	10	9.7
514179	497445	16259	396	18987	1395	1.17	4522	1662	11520	174	16.1
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
17264	17264	0	0	0	309	1.17	362	121	670	14	8.6
22882	0	0	22882	0	341	1.18	411	502	876	33	13.6
15483	15483	0	0	0	223	1.53	506	194	1082	19	10.1
43389	0	2432	40897	1213	1159	1.07	382	286	843	25	17.4
44769	27159	15903	1708	0	322	.96	492	513	976	42	7.2
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	5705	129	[illegible]
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	1685	30	[illegible]
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	3749	83	[illegible]
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	1414	11	[illegible]
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	15145	164	[illegible]
17701	17701	0	0	0	260	.97	334	395	247	27	10.7
38762	38762	0	0	0	233	.44	708	347	1582	32	6.3
21981	9271	12710	0	0	338	1.00	370	285	632	26	10.1
54325	0	0	54325	0	296	1.03	1312	525	3332	48	10.0
32428	32428	0	0	0	225	1.05	914	339	1701	36	8.7
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	1793	49	[illegible]
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	2187	91	[illegible]
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	941	32	[illegible]
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	0	N/A
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	2285540	0	N/A
50652	50652	0	0	0	461	1.03	686	616	2151	25	11.9
75340	23839	51501	0	0	1546	.79	401	161	801	17	11.5
16541	16216	308	17	0	439	1.35	345	194	666	19	14.3
538091	538015	76	0	32395	1194	1.11	5560	1304	14064	165	14.3
5221122	4666124	263278	291639	168204	688	$1.11	59022	26298	2393154	2358	12.4

OTHER TRUCKING SEGMENTS

(all dollar amounts in thousands)

Fleet Name, City, State	Gross Revenues	Total Operating Expenses	Net Operating Income	Operating Ratio	Interest Expense	Other Income Adjustments	Income/ Deferred Taxes	Net Income	Net Profit Margin, %
OTHER GENERAL FREIGHT									
ALTRUK FREIGHT SYSTEM INC, TAMPA, FL	$ 62558	$ 64617	$ (2059)	103.3	$ 614	$ (134)	$ 0	$ (2807)	(4.49)%
BUILDERS TRANSPORT, CAMDEN, SC	185258	171676	13582	92.7	5987	1227	2400	6422	3.47
COUNTRY WIDE TRUCK SVC, CUCAMONGA, CA	72664	67589	5075	93.0	1673	(3)	1497	1902	2.62
CRETE CARRIERS CORP, LINCOLN, NE	89008	83940	5068	94.3	59	1263	2991	3281	3.69
DART TRANSIT CO, ST PAUL, MN	73693	67706	5987	91.9	56	(1920)	55	3956	5.37
J. B. HUNT TRANSPORT INC, LOWELL, AR	286419	243453	42966	85.0	4219	3597	16373	25971	9.07
JONES MOTOR CO INC, SPRING CITY, PA	74601	73769	832	98.9	3	413	0	1242	1.66
KLLM INC, JACKSON, MS	75230	68038	7192	90.4	2535	107	1750	3014	4.01
MERCHANTS HOME DELIVERY, OXNARD, CA	62431	56649	5781	90.7	19	(686)	2391	2685	4.30
MISSOURI-NEB EXPRESS INC, ST JOSEPH, MO	70186	63690	6496	90.7	1828	1423	1725	4366	6.22
MUNSON TRPTN INC, MONMOUTH, IL	66091	59658	6433	90.3	3505	(132)	(406)	3202	4.84
NATIONAL FREIGHT, VINELAND, NJ	137344	134049	3295	97.6	5774	3673	334	862	0.63
OVERLAND EXPRESS INC, INDIANAPOLIS, IN	95694	105935	(10241)	110.7	4731	9879	100	(5193)	(5.43)
PACIFIC MOTOR TRUCKING, BURLINGAME, CA	70756	72543	(1787)	102.5	332	1030	24	(1113)	(1.57)
PENNSYLVANIA TRUCK LINES INC, WYNNEWOOD, PA	93078	92972	106	99.9	1094	(192)	504	(1684)	(1.81)
RYDER FREIGHT SYSTEM INC, SALT LAKE CITY, UT	133983	144290	(10307)	107.7	(153)	(301)	(4833)	(5622)	(4.20)
WHITEFORD TRUCK LINES, SOUTH BEND, IN	137010	128489	8521	93.8	7871	0	0	650	0.47
LIQUID PETROLEUM									
CHEMICAL LEAMAN TANK LINES, EXTON, PA	202359	196602	5756	97.2	4787	319	560	728	0.36
GROENDYKE TRPT INC, ENID, OK	67453	66276	1177	98.3	1002	83	8	250	0.37
KOCH SERVICE INC, WICHITA, KS	88059	74115	13944	84.2	0	(5)	6058	7881	8.95
MATLACK INC, WILMINGTON, DE	204301	201448	2853	98.6	5858	956	(1285)	(764)	(0.37)
MILLER TRANSPORTERS INC, JACKSON, MS	66936	63736	3200	95.2	995	44	907	1342	2.00
REFINERS TRPT & TERMINAL, CLEVELAND, OH	65686	69079	(3392)	105.2	1463	129	175	(4901)	(7.46)
MOTOR VEHICLES									
ANCHOR MOTOR FRT, BIRMINGHAM, MI	286122	275338	10784	96.2	6144	364	5800	(796)	(0.28)
AUTO CONVOY CO, DECATUR, GA	64722	67346	(2624)	104.5	795	34	0	(33825)	(5.23)
CASSENS TRPTN CO, EDWARDSVILLE, IL	67218	67135	83	99.9	269	104	93	(175)	(0.26)
COMMERCIAL CARRIERS INC, SOUTHFIELD, MI	189539	174705	14834	92.2	0	879	6911	8802	4.64
COMPLETE AUTO TRANSIT, BLOOMFIELD HILLS, MI	234477	218136	16341	93.0	1720	2109	6401	10329	4.41
CONVOY CO, PORTLAND, OR	62637	62458	179	99.7	951	653	0	(119)	(0.19)
JACK COOPER TRPT CO, OKLA CITY, OK	79825	78986	839	99.0	1605	(349)	(415)	(700)	(0.88)
DALLAS & MAVIS FORWARDING CO, KENOSHA, WI	65024	61221	3803	94.2	108	(27)	1583	2085	3.21
E&L TRPT CO, DEARBORN, MI	97372	97077	295	99.7	13	648	437	493	0.51
M&G CONVOY INC, BUFFALO, NY	117973	110456	7517	93.6	1089	31	1793	4666	3.96
THE MOTOR CONVOY INC, DECATUR, GA	128611	127524	1087	99.2	454	(250)	0	383	0.30
NU-CAR CARRIERS INC, BIRMINGHAM, MI	142916	134604	8312	94.2	3237	50	2202	2933	2.05
REFRIGERATED COMMODITIES									
FFE TRPTN SVCS INC, DALLAS, TX	83261	80247	3014	96.4	166	363	1078	2133	2.56
MIDWEST COAST TRPT INC, SIOUX FALLS, SD	70747	68074	2673	96.2	102	48	1014	1605	2.27
NATIONAL CARRIERS INC, LIBERAL, KS	67327	65146	2181	96.8	0	91	1175	1097	1.63
OTHER SPECIAL COMMODITIES									
ANDERSON TRUCKING SVC, ST CLOUD, MN	74720	72099	2621	96.5	869	(119)	0	1633	2.19
CONTRACT FREIGHTERS INC, JOPLIN, MO	82039	72499	9540	88.4	2945	(4499)	0	2096	2.55
MIDWESTERN DISTRI INC, FORT SCOTT, KS	68465	70838	(2373)	103.5	345	187	0	(2531)	(3.70)
PAULS TRKG CORP, AVENEL, NJ	65326	62760	2566	96.1	0	0	1202	1365	2.09
SCHNEIDER NATIONAL CRRS, AURORA, IL	229458	233879	(4421)	101.9	N.A	(680)	0	(5101)	(2.22)
SIGNAL DLVY SVC, DOWNERS GROVE, IL	232276	227004	5272	97.5	3799	624	3974	(1877)	(0.81)
TRI-STATE MOTOR TRANSIT, JOPLIN, MO	103186	105229	(2043)	102.0	1645	1089	230	(2829)	(2.74)
UNIVERSAL AM-CAN INC, STERLING HGTS, MI	65506	61731	3775	94.2	0	655	895	3535	5.40
WERNER ENTERPRISES, OMAHA, NE	139089	117697	21391	84.6	918	269	8668	12074	8.68

Salaries-Officers/ Supervisors	Salaries & Wages	Fringes	Maintenance/ Operating Supply/Exp.	General Supplies & Expenses	Operating Taxes & Licenses	Insurance	Communication & Utilities	Depreciation & Asset Disposition	Equipment Rents/Purch. Transportation	Tons Carried 000	Vehicle Mileage 000
$ 1009	$ 8641	$ 2199	$ 15052	$ 5063	$ 1943	$ 3259	$ 1286	$ 347	$ 25819	909	53642
→	73055	←	39863	2080	16438	9820	3694	18697	8029	5500	181893
→	14132	←	11232	3465	2431	3141	N/A	4157	29031	N/A	72270
2160	1114	638	2177	1126	(184)	1990	855	1644	72420	1606	90037
2476	1348	747	5500	1689	1335	2133	833	2059	49584	1082	69633
11107	87448	14861	48088	7940	25039	12604	6805	29561	0	3477	286477
3254	11217	5488	107	7291	1661	2514	515	95	41627	1482	52380
1525	17218	3585	24191	2522	2605	2555	1279	7838	4720	957	73090
4315	2502	1075	145	5176	122	(603)	352	441	43124	0	0
2833	15659	4330	14243	2900	2968	2695	899	5150	12013	720	72602
1649	19244	4198	15641	1505	5809	2381	1008	7542	681	1348	65349
→	28084	←	15043	6002	6753	4633	3126	12723	57685	N/A	107613
→	37783	←	38999	5604	N/A	4752	N/A	7862	10935	N/A	N/A
3398	27477	13629	9553	4421	2809	2093	542	549	8072	1043	20864
10154	32085	13070	16274	6416	2073	1717	994	3827	6362	0	0
3975	24070	4608	33840	6867	5142	7389	3086	3591	51722	1521	137251
1959	21456	0	27722	20404	4621	5371	2400	12080	32475	N/A	211962
12450	42295	20345	25716	10325	7026	7979	4448	11069	54949	6371	103722
2383	19121	5014	9348	2294	2931	6353	686	3555	14586	4570	49985
4030	24970	4942	15367	6775	4818	3267	1419	7397	1129	0	46986
11875	46632	17027	35292	11041	7730	6593	4550	14234	46474	8099	103739
4434	16567	6606	9875	3605	3040	2362	1270	2077	13900	3421	42877
1806	17648	8735	9459	11002	1069	4044	763	3223	11330	6850	33700
10216	104226	40532	41993	34558	6806	13847	2034	20742	385	3704	118008
1643	26268	9112	9290	4762	3409	3840	556	972	7494	1253	32011
2079	25119	8514	11345	2511	3865	2139	523	1561	9479	1086	33069
7125	63156	24518	25706	5216	8992	6871	1169	10882	21070	3205	86366
7205	62237	35113	37215	50386	N/A	6504	N/A	19476	N/A	N/A	95876
2285	25659	9597	9640	3884	3708	2888	725	2518	1554	682	28763
4855	30707	11666	15239	3043	4707	2972	718	5067	12	1300	39839
1441	16438	6705	6004	10763	2406	2335	759	695	13675	919	37570
5344	29379	11761	13511	6327	4537	4366	763	2716	18373	1194	33609
2695	39271	14601	15956	4170	4939	4441	930	9658	13795	1431	41903
2258	44936	15997	19962	9787	6148	5895	939	1662	19940	4740	118413
5091	50038	17766	21591	10473	2809	10573	1191	7931	7141	2850	17864
5164	2317	2361	4724	4292	825	2691	1879	1817	54177	871	45112
2731	703	951	948	1111	89	2310	585	2006	56640	803	73427
1897	1553	415	2579	2279	580	3364	350	1404	50725	1125	62490
3093	5699	1795	7089	3900	2312	2452	1359	3224	41176	0	0
2520	19209	5240	12593	1880	2468	2760	1310	7235	17284	1209	75143
1552	2209	792	2568	4304	1557	5773	1185	318	50580	952	66358
2814	15978	4357	9608	2378	2061	1746	350	2969	20499	1846	23812
0	37467	0	33661	38960	9541	14573	5066	(13)	94624	0	0
8259	94570	36357	26495	21692	11153	7547	1259	16067	3605	0	0
6356	11555	4534	8801	5534	4283	4723	2204	2947	54292	737	22511
3044	2301	806	702	5468	1219	1586	1120	2834	42651	1439	43569
→	45139	←	28797	540	13556	7159	1880	14096	6331	2610	139705

OTHER TRUCKING SEGMENTS

(all dollar amounts in thousands)

Fleet Name, City, State	Gross Revenues	Total Operating Expenses	Net Operating Income	Operating Ratio	Interest Expense	Other Income Adjustments	Income/ Deferred Taxes	Net Income	Net Profit Margin, %
HOUSEHOLD GOODS									
ALLIED VAN LINES, BROADVIEW, IL	$ 382738	$ 379179	$ 3559	99.1	$ 994	$ 5153	$ 2358	$ 5360	1.40%
ATLAS VAN LNS INC, EVANSVILLE, IN	184754	173939	10815	94.2	8003	(1029)	1223	560	0.30
BEKINS VAN LINES CO, HILLSIDE, IL	216723	216212	511	99.8	215	791	476	611	0.28
BURNHAM SERVICE CO INC, COLUMBUS, GA	93878	83119	10759	88.5	2208	511	3746	5316	5.66
GRAEBEL VAN LINES INC, WAUSAU, WI	62118	61000	1118	98.2	233	(14)	392	479	0.77
MAYFLOWER TRANSIT INC, CARMEL, IN	312074	298082	13992	95.5	2936	9102	7836	12322	3.95
NORTH AMERICAN VAN LNS, FORT WAYNE, IN	790520	763524	26996	96.6	8727	20310	18344	20235	2.56
UNITED VAN LINES, FENTON, MO	419414	422983	(3569)	100.9	3443	5780	(445)	(787)	(0.19)

Definitions And Explanations Of Financial Terminology Used On Charts

Operating Ratio: Operating expenses as a percentage of gross revenues. Since it excludes extraordinary expenses, income taxes and interest, individual peculiarities are eliminated so the ratio may be used as an industry-wide measure of performance.

Other Fringes: Includes charges such as federal and state payroll taxes, group and workers' compensation insurance, pension and retirement plans through both commercial insurance and unions.

Maintenance/Operating Supplies and Expenses: Includes fuel, oil, lubricants and coolants, vehicle parts, vehicle maintenance by outside vendors, tires and tubes, and miscellaneous supplies such as hand tools, brake fluid and antifreeze.

General Supplies and Expenses: Includes costs of administrative supplies including computer software, books, magazines, magnetic tapes, postage, stationery, printing of tariffs, advertising, commission agent fees, solicitation commissions, company personnel's T&E expenses. Also building and equipment rents and miscellaneous expenses such as fees for professional services by physicians, attorneys, etc., plus uncollectable revenues.

Operating Taxes and Licenses: Includes fuel and oil taxes, vehicle license and registration fees based on usage, real estate and personal property taxes, and tax items such as capital stock taxes, gross receipts taxes, occupancy taxes, etc.

Depreciation and Amortization & Gain or Loss on Disposition of Operating Assets: Includes depreciation of structures on owned land, revenue and shop equipment, furniture and office equipment; amortization of: improvements to leasehold property, fixed term motor carrier franchises, permits, licenses, patent rights, etc.; gain or loss on disposition of operating assets such as sold, traded or retired tractors, trailers and trucks.

Revenue Equipment Rents and Purchased Transportation: Includes amounts payable for: furnishing vehicles with or without the services of drivers, transportation of shipments in another carrier's vehicle including intermodal fleets, and allowance to shippers for picking up or delivering freight to a carrier's facility.

INDUSTRY TRENDS AND STATISTICS

By **JERRY STANDLEY**, *Editor-In-Chief*, and **MARGARET ROMAN-SLAVIN**, *Market Research Editor*

"The interesting thing about Class 8 is," according to Peter Toja of Economic Consulting and Planning (a former v.p. of Merrill Lynch Economics), "it is doing well without two of its major markets: construction and mining."

Toja's optimistic observation sums up the strength that Class 8 has exhibited over the past several years with "significant replacement pressure...but no downturn" characterizing the current sales plateau and the near term outlook.

The trailer outlook is similarly good, at least through 1989, according to Toja. "In spite of some pretty good years recently, I see no reason to believe that it [the market] is going to turn down."

Despite continuing depressed farm, mining and construction markets, most economic indicators that impact truck and trailer sales are strong. There is some possibility for upward pressure of interest rates, but at no more than, "½% to 1% above current levels between now and the end of 1989," Toja says, adding that the incentive to invest in capital goods is extremely strong right now. Toja also expects fuel costs to decrease slightly this year, then stabilize next year, adding more fuel to his optimistic forecast.

"I'd like to say I see something out there that is going to punch a hole in your market, but I don't."

STATISTICAL ANALYSIS OF THE TRUCK INDUSTRY—PRIVATE AND FOR-HIRE CARRIAGE*

FLEET SIZE	TOTAL FLEETS	TOTAL VEHICLES *	# OF STRAIGHT TRUCKS OPERATED	# OF TRACTORS OPERATED	# OF TRAILERS OPERATED	# OF BUSES OPERATED	# OF OFF-HIGHWAY VEHICLES OPERATED
500 & over	4,058	4,686,291	1,653,060	763,834	1,690,688	279,690	299,019
100–499	14,525	2,475,005	813,488	406,177	884,457	142,244	228,639
50–99	15,245	917,643	318,521	151,884	286,276	58,391	102,571
25–49	22,250	702,640	282,926	105,329	180,743	51,116	82,526
10–24	23,630	453,787	222,834	61,661	95,230	26,147	47,915
TOTAL	**79,708**	**9,235,366**	**3,290,829**	**1,488,885**	**3,137,394**	**557,588**	**760,670**
VOCATION OR BUSINESS							
Common/ Contract	15,726	2,707,553	311,241	756,478	1,580,215	16,220	43,399
Lease/Rental	2,992	975,391	381,202	234,365	335,764	7,554	16,506
Food Industry	9,888	723,010	260,893	138,927	259,635	10,865	52,690
Local, State & Federal Government	7,369	1,395,218	864,448	55,777	164,849	41,810	268,334
Construction/ Mining	14,188	841,302	342,162	69,191	230,047	3,240	196,662
Manufacturing/ Processing	6,085	473,923	150,575	63,122	209,660	3,689	46,877
Petroleum	3,131	162,410	76,894	29,044	43,605	1,125	11,742
Public Utility	3,504	558,613	423,015	10,880	69,574	3,059	52,085
Retail/ Wholesale Delivery	8,059	559,306	260,177	95,868	151,056	7,025	45,180
Sanitation & Refuse	931	42,569	29,103	3,728	6,125	87	3,526
Schools	3,884	299,024	55,698	3,483	5,987	221,830	12,026
Buses	1,727	262,091	12,176	4,041	7,196	236,283	2,395
Other	2,224	234,956	123,245	23,981	73,681	4,801	9,248
TOTAL	**79,708**	**9,235,366**	**3,290,829**	**1,488,885**	**3,137,394**	**557,588**	**760,670**

* Does not include passenger cars. *Source: CCJ Census of the Professional Truck Fleet Market, June 1988*

NUMBER OF FOR-HIRE CARRIERS

Year	Class I (Over $5 Million)	Class II ($1-$5 Million)	Class III (Under $1 Million)	TOTAL
1987	856	1,266	35,505	38,338
1986	947	1,387	33,903	36,948
1985	1,013	1,489	30,337	33,283
1984	1,088	1,554	27,370	30,481
1983	1,139	1,631	24,411	27,517
1982	1,144	2,139	22,059	25,722
1981	1,031	2,293	18,563	22,270

Left: This chart logs the continuing consolidation of larger Class 1 and 2 carriers (Class 1 = revenues greater than $5 million; Class 2 = between $1 million and $5 million), as well as the growth in Class 3 (revenues less than $1 million). The number of Class 1 carriers has dropped 25% since the high of 1982, but the real squeeze is among Class 2 carriers, which have diminished 44.8% - by 1,027 carriers) since 1981. The Class 3 ranks have risen 143% (20,895) since 1980 levels of 14,610 carriers. The number for Class 3 can be somewhat misleading because the numbers are for all Interstate Commerce Commission authorized carriers.

The carrier totals for 1987 and 1986 reflect 711 Class 1 and 2 carriers operating, but exempted from filing with the Interstate Commerce Commission. The number of exempted Class 1 and 2 carriers in previous years totaled: 444 in 1985; 469 in 1984; 336 in 1983; 380 in 1982; 383 in 1981; and 324 in 1980.

Source: American Trucking Associations, Inc.

SELECTED FINANCIAL DATA FROM CLASS 1 AND CLASS 2 COMMON CARRIERS

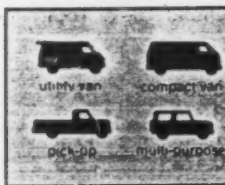
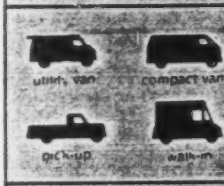
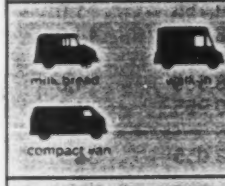
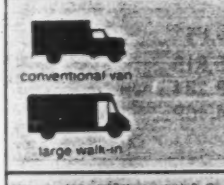
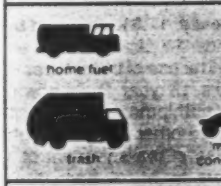
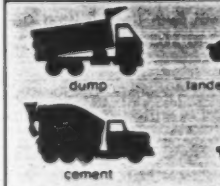
	All General Freight & Specialized Carriers		Percent of Change	Percent of Revenue
	1987 (000)	1986 (000)	(87-86)	(1987)
Number of Carriers	433	433		
GROSS OPERATING REVENUES	$19,759,468	$18,829,116	4.94%	100.00%
Salaries-Officers and Supervisors	$1,568,111	$1,468,519	5.49%	7.94%
Salaries & Wages	$5,793,533	$5,297,092	9.37%	29.32%
Miscellaneous Paid Time Off	$552,019	$512,382	7.74%	2.79%
Other Fringes	$2,169,128	$1,999,471	8.49%	10.98%
Salaries, Wages & Fringe Benefits	$10,082,791	$9,295,464	8.47%	51.03%
Operating Supplies & Expenses	$1,992,044	$1,816,217	9.68%	10.08%
General Supplies & Expenses	$878,591	$812,487	8.14%	4.45%
Operating Taxes & Licenses	$695,029	$639,363	8.71%	3.52%
Insurance	$627,663	$581,154	8.00%	3.18%
Communication & Utilities	$320,885	$310,560	3.32%	1.62%
Depreciation & Amortization	$873,677	$805,733	8.43%	4.42%
Equipment Rental & Purch. Trptn.	$3,291,051	$3,173,044	3.72%	16.66%
Building & Office Equipment Rental	$194,731	$175,674	10.85%	0.99%
Other & Miscellaneous Expenses	$146,756	$124,277	18.09%	0.74%
TOTAL OPERATING EXPENSES	$19,103,218	$17,733,973	7.72%	96.68%
NET CARRIER OPERATING INCOME	$656,250	$1,095,143	(40.08)%	3.32%
NET INCOME BEFORE TAXES	$499,633	$1,006,932	(50.38)%	2.53%
NET INCOME AFTER TAXES	$300,533	$608,810	(50.64)%	1.52%
OPERATING RATIO	96.68	94.18		
NET PROFIT MARGIN	1.52	3.23		
Vehicle Miles Traveled	8,769,744	8,179,516	7.22%	
Tons Handled	315,172	298,884	5.45%	

This chart, which compares totals and percentage changes in selected 1987 and 1986 financial items for 433 Class 1 and Class 2 common carriers, shows carrier performance dipping again in 1987 after a slight rebound in 1986 from 1985. The group operated more miles and hauled more tons, but at 47% reduced profits. Net operating income dropped $439 million in contrast to a $1.37 billion increase in total operating expenses. Net income after taxes fell $308 million, 51%. The group's operating ratio worsened to 2.5 points to 96.68.

Data used in this chart was compiled by American Trucking Associations, Inc., Alexandria, Va., based on carrier financial reports (Form QFR) to the Interstate Commerce Commission by Class 1 and 2 "Instruction 27" carriers (75% or greater revenues derived from general commodity freight). Statistics from United Parcel Service, contract carriers and household goods movers are excluded from this chart. To provide accurate two-year comparisons, figures from 1986 are restated on the basis of those same carriers filing 1987 reports with the ICC.

15-YEAR FACTORY SALES OF TRUCKS BY GVW (1973 through 1987)

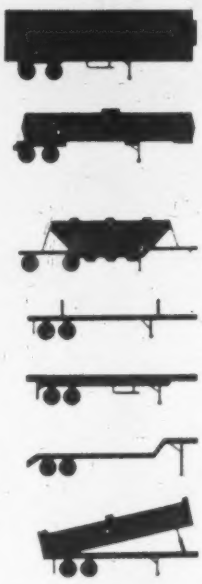
(Includes U.S. total domestic and export sales. Excludes tactical military vehicles and buses.)

	**CLASS 1** **6,000 lb & Less**	No. of Units **19,750,474**	% of Total **50.23%**
	**CLASS 2** **6,001-10,000 lb**	No. of Units **15,257,869**	% of Total **38.81**
	**CLASS 3** **10,001-14,000 lb**	No. of Units **223,867**	% of Total **0.57%**
	**CLASS 4** **14,001-16,000 lb**	No. of Units **17,197**	% of Total **0.04%**
	CLASS 5 **16,001-19,500 lb**	No. of Units **83,879**	% of Total **0.21%**
	CLASS 6 **19,501-26,000 lb**	No. of Units **1,441,887**	% of Total **3.6%**
	**CLASS 7** **26,001-33,000 lb**	No. of Units **766,489**	% of Total **1.95%**
	**CLASS 8** **33,001 lb & Over**	No. of Units **1,777,180**	% of Total **4.52%**
	TOTAL	**39,318,842**	**100.00%**

R.L. Polk estimates the total number of Class 1 to 8 trucks in use is 47,344,319. The R.L. Polk total includes imported vehicles, school buses and private fleet buses, but does not include municipal buses. The CCJ total listed above does not include buses or imports, and does not reflect a scrappage rate, which R.L. Polk estimates at 5% annually.

Source: Motor Vehicle Manufacturers Association, CCJ Marketing Dept.

BREAKDOWN OF NEW TRAILER SHIPMENTS (1973 through 1987)



	Number	% of Total
VANS		
Dry Freight/Closed Top	1,120,901	47.4
Dry Freight/Open Top	63,379	2.7
Insulated/Semi-Insulated	281,243	11.9
Drop Frame	70,473	3.0
Livestock	22,890	1.0
Total Vans	1,558,886	65.9
SPECIAL TYPES		
Tanks/Liquid	95,842	4.0
Dry Bulk	26,115	1.1
Pole and Logging	23,755	1.0
Platform	353,127	14.9
Low-Bed	99,756	4.2
Dump	108,505	4.6
All Others	100,955	4.3
Total Special Types	808,055	34.1
TOTAL COMPLETE TRAILERS	**2,366,941**	**100.0**
Detachable Trailers[1]	105,819	
Detachable Chassis[2]	218,234	
Dollies and Converter Gear[3]	54,469	

1. Mostly container units. 2. Mostly for use with containers. 3. Separate axle and fifth wheel assembly used to convert semi-trailer into full trailer for twin trailer operations.
Source: Industry Div., Bureau of the Census, Dept. of Commerce. Compiled by CCJ Marketing Dept.

NEW TRAILER SHIPMENTS BY TYPE

Type of Trailer	1987	1986	1985	1984	1983
VANS					
Dry Freight/Closed Top	99,054	95,236	84,950	115,399	58,954
Dry Freight/Open Top	2,776	3,149	3,685	4,087	3,215
Insulated/Semi Insulated	26,650	22,654	21,934	27,768	19,961
Drop Frame	5,237	3,637	8,229	7,112	3,193
Livestock	1,663	1,996	1,421	2,234	1,121
Total Vans	135,380	126,672	120,219	156,600	86,444
SPECIAL TYPES					
Tanks/Liquid	4,827	4,792	5,670	4,818	3,859
Dry Bulk	1,030	1,233	1,477	1,556	1,002
Pole and Logging	1,060	1,163	1,977	3,371	3,433
Platform	15,219	14,011	18,839	25,685	15,476
Low-Bed	10,594	10,945	11,414	8,281	3,967
Dump	7,990	8,371	8,903	8,895	4,466
All Others	19,412	4,538	7,807	4,550	3,064
Total Special Types	60,132	45,053	56,087	57,156	35,267
TOTAL COMPLETE TRAILERS	**195,512**	**171,725**	**176,306**	**213,756**	**121,711**
Detachable Trailers[1]	563	595	286	983	2,215
Detachable Chassis[2]	7,560	6,334	15,591	44,877	4,531
Dollies/Converter Gear[3]	4,371	3,755	4,522	6,759	3,072

1. Mostly container units. 2. Mostly for use with containers. 3. Separate axle and fifth wheel assembly for converting semi-trailer into full trailer in twin trailer doubles operations.
Source: Industry Div., Bureau of the Census, Dept. of Commerce. Compiled by CCJ Marketing Dept.

Truck trailer sales showed a healthy 13.8% gain (23,787 units) in 1987 after a slight fall off in 1986. Specialty trailers accounted for 63% of the increase, which included a 327% increase in the All Other specialty types, reflecting motor carriers' increased tailoring of services and equipment to shippers. Insulated trailers experienced the next biggest increase, 17.6%, followed by sales of standard typical dry vans which rose 4%. The use of trailer types, based on CCJ's 15 year Breakdown Of New Trailer Shipments, shows little relative change other than the slight .5% increase in the shipment of speciality trailers to 34.1% from 33.6% of the market over the 15-year period from 1973 to 1987.

DIESEL ENGINES USED IN TRUCKS

(Factory sales from U.S. plants including exports)

Make of Truck		Cat	Cummins	Detroit Diesel	International	Mack	All** Other	Total
Chevrolet	1987	1,595	–	35,134	–	–	–16	**36,745**
	1986	468	–	40,889	–	–	–	41,357
Ford	1987	11,551	8,940	3,632	56,261	–	19,799	**100,183**
	1986	15,281	7,199	7,232	60,049	–	6,482	96,243
Freightliner	1987	7,301	15,758	512	–	–	–	**23,571**
	1986	5,403	11,707	266	–	–	–	17,376
GMC	1987	4,029	4,232	16,272	–	–	435	**24,968**
	1986	4,225	4,226	19,056	–	–	14	27,521
International	1987	1,396	20,117	327	38,144	–	–	**59,984**
	1986	1,484	19,428	456	35,737	–	–	57,105
Jeep Corp.	1987	–	–	–	–	–	9,260	**9,260**
	1986	–	–	–	–	–	4,469	4,469
Kenworth	1987	4,549	8,301	85	–	–	–	**12,935**
	1986	4,013	6,266	102	–	–	–	10,381
Mack	1987	187	252	40	–	19,713	1	**20,193**
	1986	53	164	7	–	16,873	17	17,114
Mercedes-Benz	1987	–	–	–			4,220	**4,220**
	1986	–	–	–			4,721	4,721
Peterbilt	1987	8,784	5,410	25	–	–	–	**14,219**
	1986	5,780	4,390	112	–	–	–	10,282
White	1987	3,065	7,136	883	–	–	328	**11,412**
	1986	2,256	7,558	796	–	–	518	11,128
Others*	1987	368	592	143	–	–	–	**1,103**
	1986	209	657	109	–	–	–	975
Total	1987	42,825	70,738	57,053	94,405	19,713	34,059**	**318,793**
	1986	39,172	61,595	69,025	95,786	16,873	16,221**	298,672

Left: Diesel engine sales rose almost 7%, slightly less than the total truck factory sales reported to MVMA, which rose 8%. The share of imported diesels (All Other) doubled to 10.7% from 5%, while Detroit Diesel and International both lost ground. DDA's share fell to 17.9% from 23%; International's to 29.6% from 32%. Elsewhere there were no surpises. Mack, Cummins and Caterpillar each increased theirs slightly. Mack: 0.6% to 6%; Cummins: 1.6% to 22%; and Caterpillar: 0.3% to 13.4%.

* Others include: Oshkosh and Marmon

** All Others includes: Isuzu, Mercedes-Benz, Scania-Vabis and Volvo White. Reporting firms do not represent entire industry.

Source: Motor Vehicle Manufacturers Association.

Below: This chart illustrates the six-year performance of Class 1 through 8 domestic factory sales. 1987 is the best year of the past six for Class 7 sales, the second best for Class 8 and the worst for Class 6 which continues to decline. While there are fewer Class 6 trucks being sold, more of them are diesel. The dieselization rate of Class 6 now hovers above 50% from 38.1% in 1981. The rate is slightly higher but consistent in Class 7, which has floated primarily in the 60% range since 1981. Class 8 is virtually dieselized at 99.8%.

DOMESTIC TRUCK FACTORY SALES BY GVW

	1987	1986	1985	1984	1983	1982
Class 1 (6000 lb and less)						
Total Sales	2,270,566**	1,964,832	1,854,901	1,610,835	1,296,644	869,897
Diesel Sales	1,813	4,999	9,663	15,234	25,565	44,586
% Diesel	0.1%	0.3%	0.5%	0.9%	2.0%	5.1%
Class 2 (6001-10,000 lb)						
Total Sales	976,803	927,462	989,633	997,626	787,611	744,350
Diesel Sales	85,125	96,443	123,882	122,995	89,161	72,868
% Diesel	8.7%	10.4%	12.5%	12.3%	11.3%	9.8%
Class 3-4 (10,001-16,000 lb)						
Total Sales	476	–	19,397	5	3	10
Diesel Sales	322	-	5,870	-	-	-
% Diesel	67.6%	-	30.3%	-	-	-
Class 5 (16,001-19,500 lb)						
Total Sales	5,841	5,749	5,123	5,502	1,143	1,333
Diesel Sales	431	-	-	-	-	-
% Diesel	7.4%	-	-	-	-	-
Class 6 (19,501-26,000 lb)						
Total Sales	17,092	17,846	25,810	29,273	24,310	22,533
Diesel Sales	9,184	9,265	14,253	13,789	9,703	8,559
% Diesel	53.7%	51.9%	55.2%	47.1%	39.9%	38.0%
Class 7 (26,001-33,000 lb)						
Total Sales	84,341	77,597	81,122	74,445	48,896	48,568
Diesel Sales	56,719	47,694	50,492	43,412	29,468	26,282
% Diesel	67.2%	61.5%	62.2%	58.3%	60.3%	54.1%
Class 8 (33,001 lb & Over)						
Total Sales	121,425	103,216	120,941	138,584	78,575	68,040
Diesel Sales	121,192	102,671	120,311	137,692	78,008	67,453
% Diesel	99.8%	99.5%	99.5%	99.4%	99.3%	99.1%

TRENDS & STATISTICS

TRUCK FACTORY SALES AND TRUCKS WITH DIESELS

(U.S. domestic only; excluding tactical military vehicles)

GVW Group-ings	Truck Sales With Diesel Engines	Chevrolet	GMC	Chrysler	Ford	Freight liner	Inter national	Jeep - Corp.	Kenworth	Mack	Mercedes-Benz	Peterbilt	Volvo White	Others	Total Trucks
Under	Sales – 1987	747,435	182,861	256,007	813,941	–	–	167,604	–	–	–	–	–	–	2,167,848
6,000	w/Diesel – 1987	1,085	339	–	389	–	–	–	–	–	–	–	–	–	1,813
lb	Sales – 1986	760,224	178,912	103,457	779,878	–	–	142,361	–	–	–	–	–	–	1,964,832
	w/Diesel – 1986	2,368	1,009	–	1,622	–	–	–	–	–	–	–	–	–	4,999
6,001	Sales – 1987	323,710	92,778	41,671	502,835	–	–	15,809	–	–	–	–	–	–	976,803
to	w/Diesel – 1987	28,548	5,332	–	51,245	–	–	–	–	–	–	–	–	–	85,125
10,000	Sales – 1986	328,239	93,339	35,630	453,010	–	–	17,244	–	–	–	–	–	–	927,462
lb	w/Diesel – 1986	34,870	7,263	–	54,310	–	–	–	–	–	–	–	–	–	96,443
10,001	Sales – 1987	–	–	–	154	–	–	–	–	–	–	–	–	–	154
to	w/Diesel – 1987	–	–	–	–	–	–	–	–	–	–	–	–	–	–
14,000	Sales – 1986	–	–	–	–	–	–	–	–	–	–	–	–	–	– –
lb	w/Diesel – 1986	–	–	–	–	–	–	–	–	–	–	–	–	–	– –
14,001	Sales – 1987	–	–	–	–	–	322	–	–	–	–	–	–	–	322
to	w/Diesel – 1987	–	–	–	–	–	322	–	–	–	–	–	– –		322
16,000	Sales – 1986	–	–	–	–	–	–	–	–	–	–	–	–	–	– –
lb	w/Diesel – 1986	–	–	–	–	–	–	–	–	–	–	–	–	–	– –
16,001	Sales – 1987	239	5,602	–	–	–	–	–	–	–	–	–	–	–	5,841
to	w/Diesel – 1987	–	431	–	–	–	–	–	–	–	–	–	–	–	431
19,500	Sales – 1986	258	5,491	–	–	–	–	–	–	–	–	–	–	–	5,749
lb	w/Diesel – 1986	–	–	–	–	–	–	–	–	–	–	–	–	–	–
19,501	Sales – 1987	1,966	3,361	–	5,165	–	5,121	–	–	–	– 1,479	–	–	–	17,092
to	w/Diesel – 1987	377	992	–	1,215	–	5,121	–	–	–	– 1,479	–	–	–	9,184
26,000	Sales – 1986	2,258	2,821	–	5,592	–	5,286	–	–	–	1,889	–	–	–	17,846
lb	w/Diesel – 1986	120	1,179	–	791	–	5,286	–	–	–	1,889	–	–	–	9,265
26,001	Sales – 1987	8,483	19,132	–	30,854	–	23,703	–	–	–	2,169	–	–	–	84,341
to	w/Diesel – 1987	3,289	7,005	–	20,553	–	23,703	–	–	–	2,169	–	+	–	56,719
33,000	Sales – 1986	8,157	16,293	–	27,711	–	23,260	–	–	–	2,176	–	–	–	77,597
lb	w/Diesel – 1986	1,003	5,959	–	15,296	–	23,260	–	–	–	2,176	–	–	–	47,694
33,001	Sales – 1987	456	8,909	–	13,469	22,947	22,091	–	12,269	18,273	–	13,359	10,573	1,079	121,425
lb	w/Diesel – 1987	372	6,827	–	13,402	22,947	22,091	–	12,269	18,273	–	13,359	10,573	1,079	121,192
and	Sales – 1986	419	6,950	–	10,351	16,832	20,825	–	10,219	15,842	–	9,807	10,999	972	103,216
over	w/Diesel – 1986	77	6,841	–	10,257	16,832	20,825	–	10,219	15,842	–	9,807	10,999	972	102,671
Total	Sales – 1987	1,082,289	310,643	297,678	1,366,418	22,947	51,237	183,413	12,269	18,273	3,648	13,359	10,573	1,079	3,373,826
Total	w/Diesel – 1987	33,671	21,596	0	86,804	22,947	51,237	–	12,269	18,273	3,648	13,359	10,573	1,079	275,456
Total	Sales – 1986	1,099,555	303,806	139,087	1,276,542	16,832	49,371	159,605	10,219	15,842	4,065	9,807	10,999	972	3,096,702
Total	w/Diesel – 1986	38,438	22,251	–	82,276	16,832	49,371	–	10,219	15,842	4,065	9,807	10,999	972	261,072

Data is 1987 factory sales from U.S. plants only and does not include sales of vehicles resulting from joint venture agreements between foreign and domestic suppliers. Also, reporting firms do not represent entire industry. Volvo White numbers include Autocar, but do not reflect the Volvo GM heavy truck merger which took effect January 1, 1988. Others include Marmon and Oshkosh. Volvo White does not report separate factory sales figures for Class 8 Volvo, White and Autocar trucks (combined as 10,573 units above).
Source: MVMA.

1987 was a good year in Class 1-8 factory sales for all but three truck builders – Chevrolet, Mercedes-Benz and Volvo White – who experienced decreases of 2%, 10% and 4% respectively. By a slim one-tenth-of-one-percent, the biggest percentage increase was Freightliner's 36.3% (6,115 units), followed by Peterbilt at 36.2% (3,552 units). Class 8 sales for 1987 climbed 17.6% (18,209 units), after a 14.7% dip in 1986, returning to slightly higher than 1985 levels.

Class 7 sales were up 8.7% (6,744 units). General Motors' Chevrolet and GMC divisions combined for an 17.4% increase, followed by Ford, the volume leader, with an increase of 11.3%.

Class 6 factor sales, on the other hand, continued to slide downward, but at a much slower pace, dropping an additional 4% (754 units) in 1987 on top of a 31% drop (7,964 units) in 1986 compared to 1985.

PRIVATE FLEETS

By an overwhelming margin, private carriage is the dominant player in the U.S. trucking industry, based on the number of fleets in operation. Private carriage has become as complex as it is big. Using data collected by CCJ, these exclusive listings include a breakdown of types of vehicles the private carriers operate.

PRIVATE FLEETS

LEASE/RENTAL	Headquarters	Trucks	Tractors	Trailers	Cars	Off-Highway	Total Vehicles
G.E. Capital Fleet Services	Eden Prairie, Minn.	65,000	4800	5200	345,000	0	420,000
Peterson, Howell & Heather	Baltimore, Md.	66,000	a	4000	170,000	8000	248,000
Ryder Truck Rental	Miami, Fla.	63,129	31,178	24,155	2209	120,754	241,425e
Enterprise Leasing Co	St. Louis, Mo.	5000	0	0	75,000	0	80,000
Automotive Rentals, Inc.	Maple Shade, N.J.	25,300	630	800	43,250	NA	69,980
Hertz-Penske Truck Leasing	Reading, Pa.	14,400	8000	5300	3000	0	42,700b
Gelco TIP Trailer Leasing	Bala Cynwyd, Pa.	0	0	36,000	0	0	36,000
Amtralease	Cherry Hill, N.J.	8000	11,000	7,000	1,000	0	27,000
McDonnell Douglas Financial Group	Long Beach, Calif.	3000	2800	15,000	4000	500	25,300
AJF Leasing	St. Louis, Mo.	0	0	24,000	0	0	24,000
NationaLease	Chicago, Ill.	9500	13,750	NA	0	0	23,250
Transamerica Trailer Services	Piscataway, N.J.	0	0	20,000	0	0	20,000
Rollins Leasing Corp	Wilmington, Del.	3100	6300	4600	0	0	14,000
All-State Vehicles, Inc	Long Island City, N.Y.	800	0	0	13,000	0	13,800
Ruan Trans. Mgt. Systems	Des Moines, Ia.	620	5515	6010	1000	0	13,145
ETL Trailer Sales	Conley, Ga.	1	1	13,000	0	0	13,002
Gelco Truck Leasing	Chesterfield, Mo.	3273	5809	3461	0	0	12,543
Chancellor Fleet Corp	Boston, Mass.	340	3971	6789	0	1091	12,191
Greenbrier Capital Corporation	San Francisco, Calif.	0	55	11,317c	0	0	11,372
PLM Transportation Equipment	San Francisco, Calif.	0	275	9236	0	0	9511
Farm Credit Leasing Services	Minneapolis, Minn.	1812	1302	2841	2408	91	8454
Lend Lease	Minneapolis, Minn.	1571	3599	814	250	0	6234
Trucklease Corp (g)	Worcester, Mass.	3347	1122	1009	72	328	5878
Whiteford Systems	South Bend, Ind.	135	2183	2420	0	0	4738
PACCAR Leasing Corp.	Bellevue, Wash.	543	2870	606	0	0	4019
Immke Circle Leasing	Columbus, Oh.	120	0	5	3135	0	3260
Transportation Leasing Co	Tulsa, Okla.	960	40	48	1980	18	3046
Leslie Leasing Co	San Francisco, Calif.	650	40	55	2100	0	2845
Lily Truck Leasing Corp	Boston, Mass.	1155	754	727	40	5	2681
Mendon Leasing Corp	Brooklyn, N.Y.	2300	a	0	300	0	2600
UPS Truck Leasing	Greenwich, Conn.	1200	1200	200	0	0	2600
Transervice Lease Corp	Lake Success, N.Y.	1325	310	615	56	200	2506
United Truck Leasing Corp	Braintree, Mass.	1293	760	366	48	0	2467
Rollings Truck Leasing	Hurst, Tex.	650	1600	100	25	0	2375
DeCarolis Truck Rental	Rochester, N.Y.	429	191	462	25	1200	2307
Transamerica Corp (d)	San Francisco, Calif.	150	0	0	2000	0	2150
Transportation Leasing Company	Tulsa, Okla.	750	20	21	1230	14	2035
Edart Truck Rental Corp	Hartford, Conn.	650	600	500	50	2	1802
Mobile Office Rental	Carson, Calif.	8	7	1765	6	6	1792
Salem Leasing Corp	Winston-Salem, N.C.	91	626	748	0	0	1465
Highway Leasing Co	Needham, Mass.	92	561	734	0	0	1387
Gordon Thompson Industries	Jacksonville, Fla.	12	10	0	1100	0	1122
HUB Truck Rental, NY Reg	Farmingdale, N.Y.	876	70	0	20	0	966
Commercial Equipment Co	Charlotte, N.C.	7	306	617	0	0	930
Doerrs Trailer Leasing (f)	Orlando, Fla.	NA	3	890	1	2	896
Rice & Holman Leasing	Pennsauken, N.J.	316	0	0	567	0	883
Lease Line, Inc	N. Brunswick, N.J.	66	148	643	18	4	879
Hunsaker Truck Lease, Inc	Dallas, Tex.	120	260	240	0	0	620

a—included in "Trucks;" b—includes 12,000 units acquired with buyout of leasing operations of Leaseway; c—large capacity vans; d—does not include Transamerica Interway or Transamerica Trailco Services; e—includes 83 buses; f—regional fleet figures, not national; g—Trucklease cars controlled by Auto Rental Corp. Both are subsidiaries of Automotive Management, Inc. NA—not available.

PRIVATE FLEETS

GENERAL INDUSTRY	Headquarters	Straight Trucks	Tractors	Trailers	Cars	Off Highway	Total Vehicles	Annual Mileage (millions)	* % Leased
Westinghouse Electric Corp	Pittsburgh, Pa.	2400	440	300	4400	0	7540	170	0
Honeywell, Inc	Minneapolis, Minn.	2629	0	0	4658	0	7287	120.4	100
Autocross (Wickes Companies)	Santa Ana, Calif .	1077	371	1050	2753	2000	7251	NA	65
Goodyear Tire & Rubber	Akron, Oh.	4000	100	100	2500	50	6750	NA	0
Union Carbide Corp, Linde Div	Springfield, N.J.	10	400	500	3500	50	4460	NA	90
Air Products & Chemicals, Inc	Allentown, Pa.	340	500	1360	500	170	2870	48	0
Pfizer Inc.	New York, N.Y.	505	3	3	2319	0	2827	74	44
Safety-Kleen Corp.	Elgin, Ill.	98	69	88	300	2000b	2555	44.6	0
National Linen Service	Atlanta, Ga.	1910	25	50	400	NA	2385	35	NA
Floyd S Pike Electrical Contractor	Mount Airy, N.C.	1225	4	483	44	530	2286	NA	0
Reliance Electric	Cleveland, Oh.	110	25	50	2100c	0	2285	NA	95
J C Penney Co.	New York, N.Y.	1300	178	450	320	10	2258	35	100
Environmental Industries	Calabasas, Calif.	1100	35	500	110	375	2120	NA	0
Ingersoll-Rand Co Ltd	Woodcliff Lake, N.J.	3	35	130	1910	NA	2078	43	100
Hoechst Celanese Corp	Somerville, N.J.	76	15	73	1872	3	2039	50	98
Greif Brothers Corp	Delaware, Oh.	43	272	1405	151	0	1871	NA	0
Montgomery Ward & Co	Chicago, Ill.	1555b	0	0	120	0	1675	32	100
Texas Industries, Inc	Dallas, Tex.	683	148	356	195	149	1531	NA	1
Hewlett Packard, S Sales Reg	Atlanta, Ga.	26	0	0	1493	0	1519	36.5	0
American Greetings	Cleveland, Oh.	5	25	60	1400	0	1490	26	NA
American Linen Supply Co	Minneapolis, Minn.	1430	19	24	0	9	1482	21	0
Trinity Industries	Dallas, Tex.	15	198	450	115	680	1458	16.8	10
CW Wright Construction	Richmond, Va.	825	72	310	18	104	1329	7-8	0
N L Industries, Inc	Houston, Tex.	340	108	206	560	46	1260	23	10
West Point Pepperell Trans. Co.	West Point, Ga.	2	200	678	332	6	1218	23	100
Potlach Corp	San Francisco, Calif.	484	108	92	120	373	1177	NA	0
Caterpillar Tractor Co	Peoria, Ill.	300	60	365	450	0	1175	NA	72
Brad Ragan, Inc	Spruce Pine, N.C.	740	29	54	300	NA	1123	NA	0
Beckman Instruments	Fullerton, Calif.	18	2	5	1063	6	1094	40	100
Hillenbrand Industries, Inc	Batesville, Ind.	275	215	508	79	7	1084	24.3	0
Scotty's Inc	Winter Haven, Fla.	375	40	180	39f	450b	1084	NA	NA
Liquid Air Ind, Gases Div	Walnut Creek, Calif.	5	220	690	106a	0	1021	17.8e	23
Sully-Miller Contracting Co	Long Beach, Calif.	569	111	226	66	30	1002	NA	9
Grossmans Div, Evans Products	Braintree, Mass.	125	35	110	170	550	990	4.5	25
Northrop Aircraft Div	Hawthorne, Calif.	287b,c	18	57	95	521d	978	5.9	1
Rite Aid Corp	Harrisburg, Pa.	105b	90	150	600	2	947	6	0
McCrory Stores	York, Pa.	10	250	600	60	0	920	16	90
Terminal Freight Handling Co.	Dallas, Tex.	2	240	635	2	10	889	16	3
Growmark, Inc	Bloomington, Ill.	5	123	679	0	0	807	9.5	7
Johnson Controls Battery Div	Milwaukee, Wisc.	0	234	570	0	0	804	13.3	0
Western Auto Supply	Kansas City, Mo.	0	248	512	0	0	760	17.2	0
James Julian, Inc	Wilmington, Del.	130	20	90	20	450	710	2	0
Linder Industrial Machinery Co	Lakeland, Fla.	40	4	4	90	570	708	5	0
Union Camp Corp	Wayne, N.J.	5	150	318	N/A	N/A	468	NA	65
Cianbro Corp	Pittsfield, Me.	72	13	50	28f	150	316	NA	3
LaRoche Industries Inc.	Atlanta, Ga.	45	55	98	75	5	278	NA	95

* – does not include cars; a – light trucks; b – includes vans; c – includes light trucks; d – includes some miscellaneous equipment; e – trucks only; f – light pick-ups; NA – not available

PRIVATE FLEETS

FOOD	Headquarters	Straight Trucks	Tractors	Trailers	Cars	Off Highway	Total Vehicles	Annual Mileage (millions)	* % Leased
Pepsi-Cola Bottling	Purchase, N.Y.	3000	2600	3500	1500	1400	12,000	125	10
Continental Baking	St. Louis, Mo.	9015	720	756	404	12	10,907	181.7	48
ARA Services	Philadelphia, Pa.	4950	30	30	2337	840	8187	245	34
Borden Inc.	Houston, Tex.	3058	885	1383	716	0	7344	130	5
Campbell Taggart, Inc	Dallas, Tex.	4750	780	900	825	0	7255	142	20
Interstate Brands Corp	Kansas City, Mo.	5546	557	738	89	0	6849	133	2
Nabisco Brands, USA	East Hanover, N.J.	1500	57	119	5000	0	6676	133	3
Kraft, Inc.	Glenview, Ill.	475	525	710	4500	0	6210	10.3	70
Safeway Stores	Oakland, Calif.	23	1542	3487	NA	362	5414	94	0
Fleming Companies	Oklahoma City, Okla.	118	1462	2536	870	0	4986	96	2.3
Chemlawn Corp.	Columbus, Oh.	3844	0	0	1094b	0	4938	NA	0
Super Valu Stores	Minneapolis, Minn.	2	1050	2330	860	61	4141	77.5	0
Tyson Foods, Inc	Springdale, Ark.	208	1091	1425	837b	567	4128	54	14
General Cinema Beverages	Chestnut Hill, Mass.	2075b,c	300	350	275	700	3700	35	NA
McKesson Corp.	San Francisco, Calif.	1500	150	215	1300	0	3165	NA	5
The Southland Corp	Dallas, Tex.	927	877	1064	0	0	2868	61	11
Wetterau, Inc	Hazelwood, Mo.	33	687	1318	682	0	2720	41.4	9
Land O'Lakes, Inc	Minneapolis, Minn.	450	235	500	900d	500	2585	NA	80
Stroehmann Bakeries, Inc	Williamsport, Pa.	1600	255	340	240	0	2435	40	30
Pauls Trucking Corp.	Woodbridge, N.J.	2	306	2043	12	28	2391	24	1
Arnold Foods	Greenwich, Conn.	1800	126	158	270	0	2354	52	15
Wakefern Food Corp	Elizabeth, N.J.	0	450	1500	250	0	2200	25	a
General Foods Corp	White Plains, N.Y.	0	65	170	1900	0	2135	6e	26
Holly Farms Poultry Ind	Wilkesboro, N.C.	170	485	997	154	273	2092	41	0
Giant Food, Inc	Landover, Md.	325	244	1251	19	5	1844	16	NA
Stop & Shop Companies	Boston, Mass.	2	178	1234	85	0	1499	42.5	NA
Foster Farm Services	Livingston, Ca.	81	280	577	540	0	1478	15	0
Leggs Products, Inc.	Winston Salem, N.C.	1200	25	50	150	10	1435	25	100
Acme Markets	Philadelphia, Pa.	2	275	890	150	0	1317	12	NA
Beatrice Foods, Bottled Water Div	Los Angeles, Calif.	892	52	79	79	104	1206	39.4	60
Thomas J Lipton, Inc	Englewd. Cliffs, N.J.	5	0	6	1140	0	1204	19.5	0
Martin Brower Co	Des Plaines, Ill.	3	423	639	90c	4	1159	45.2	95
H.E. Butt Grocery Co	Corpus Christi, Tex.	11	213	732	189	0	1145	30.5	0
Houston Coca-Cola Bottling	Houston, Tex.	508b	188	225	60	160	1141	12	0
Hartz Mountain Corp	Harrison, N.J.	750	10	10	300	0	1070	NA	100
Northrup King Co	Minneapolis, Minn.	80	1	2	434	350	867	14	15
Central Soya Co	Fort Wayne, Ind.	73	93	207	262	156	867	7.4	85
Entenmann's Oroweat NE	Bay Shore, N.Y.	605	2	87	101	1	837	12	0
Metz Baking Co	Sioux City, Ia.	668	67	79	2	0	816	18	0
Vons Grocery Co	El Monte, Calif.	40	198	504	0	9	751	14	0
Beverage Management	Columbus, Oh.	334	87	117	180	0	718	12	2
Drake Bakeries, Inc	Wayne, N.J.	621	18	44	34	0	717	9.1	7
Mana Pro Corporation	Los Angeles, Calif.	75	99	199	63	150	694	5.6	2
Sweet Life Foods	Suffield, Conn.	0	117	300	257	7	681	5	0
Dial Corp.	Phoenix, Ariz.	0	37	106	480	0	623	16.2	100
United States Sugar	Clewiston, Fla.	494	10	18	79	9	610	NA	NA
Swift-Eckrich, Inc.	Quincy, Mich.	281	36	63	230	0	610	21	100

* – does not include cars; a – 100% of tractors & 20% of trailers; b – includes pick-up trucks; c – includes vans; d – includes light trucks; e – trucks only; NA – not available

PRIVATE FLEETS

PUBLIC UTILITIES	Headquarters	Straight Trucks	Tractors	Trailers	Cars	Off Highway	Total Vehicles	Annual Mileage (millions)	* % Leased
GTE Service Corp	Irving, Tex.	25,700c	150	725	8410	NA	34,985	380	8
AT&T Information Services	Basking Ridge, N.J.	5401c	74	347	19758	NA	25,580	NA	NA
Bell South Corp.	Atlanta, Ga.	19,804c	63	106	5532	0	25,399	259	15
US West	Thornton, Colo.	12,780c	127	50	2830	4541	20,328	150	0
Southwestern Bell Telephone	St. Louis, Mo.	14,357	12	NA	3530	0	17,939	150	0
Pacific Gas & Electric	San Francisco, Calif.	9202	82	3898	2962	284	16,428	5	0
Pacific Bell	San Francisco, Calif.	11,705c	28	28	2392	NA	14,153	NA	0
New York Telephone	Brooklyn, N.Y.	7,275	1	1	2174	NA	9449	89	2
Southern California Edison	Pomona, Calif.	3553	80	1087	1967	813	7500	60	100
General Telephone Co.	Pomona, Calif.	50	35	80	1200	0	7500	60	0
New England Telephone	Boston, Mass.	5600c	0	0	1500	0	7400	NA	60
American Elec. Power System	Columbus, Oh.	4130	45	130	2040	510	6855	68	98
Duke Power Co	Charlotte, N.C.	2976	85	1266	1188	1060	6575	73	0
LA Dept Water & Power	Los Angeles, Calif.	3200	53	329	1280	1010	5872	51	9
General Public Utilities	Parsippany, N.J.	2667	26	1148	1292	673	5806	51	75
Public Service Elec & Gas	Newark, N.J.	2430c	10	768	1800	398	5406	41.1	0
Consumers Power Co	Jackson, Mich.	2983	70	862	616	523	5054	39.6	99
Southern California Gas Co	Los Angeles, Calif.	4067	10	295	508	75	4955	43	100
Niagara Mohawk Power Corp	Syracuse, N.Y.	2615	27	934	667	489	4732	39	88
Commonwealth Edison	Maywood, Ill.	1907	46	709	1594	182	4438	45	1
Florida Power & Light	Miami, Fla.	1500	50	826	319	302	4366	NA	2
Con Edison of NY	Astoria, N.Y.	2523	23	194	1072	320	4258	5	0
Northeast Utility Service	Kensington, Conn.	1996a,b	11	778	653	286	3724	30	NA
N Indiana Public Service	Hammond, Ind.	1617	20	680	535	784	3636	19	8
Columbia Gas Distribution	Columbus, Oh.	1873	8	214	888	611	3594	41	100
Northern States Power Co	Minneapolis, Minn.	1855	11	622e	1003	16	3507	14	0
S New England Telephone	New Haven, Conn.	2306c	7	7	1155	NA	3468	33.6	[illegible]
Arizona Public Service Co	Phoenix, Ariz.	1710	20	475	712	285	3202	31	5
ARKLA, Inc	Shreveport, La.	1480	33	748	292	603	3156	NA	0
Pennsylvania Power & Light	Allentown, Pa.	1250	16	650	888	230	3034	0	100
Long Island Lighting Co.	Hicksville, N.Y.	1394	13	427	683	367	2884	11	0
Public Service Co of CO	Denver, Colo.	1561	17	541	[illegible]	353	2870	22	0
Detroit Edison	Detroit, Mich.	1250	55	620	250	522	2697	25	93
Philadelphia Electric	Berwyn, Pa.	1416	22	473	737	23	2671	16	100
Central Telephone Co	Chicago, Ill.	1819	0	60	675	20	2574	25.9	0
San Diego Gas & Electric	San Diego, Calif.	1326	60	284	660	133	2463	24	0
New York State Elec. & Gas	Binghamton, N.Y.	1340	12	325	487	283	2447	20.5	74.5
Baltimore Gas & Electric	Baltimore, Md.	1469	17	33	842	16	2327	23.7	10
Illinois Power	Decatur, Ill.	1028	5	480	354	396	2263	13	0
General Telephone of NW	Everett, [illegible]	1363c	11	88	651	0	2113	19.6	3
Jersey Central Power & Light	Morristown, [illegible]	1105a,b	9	609	333	50	2106	22	75
Northern Illinois Gas	Naperville, Ill.	1021	3	230	556	290	2100	22	0
Salt River Project	Phoenix, Ariz.	1260	19	222	300	295	2096	15	0
Wisconsin Electric Power	Milwaukee, Wisc.	842	12	553	198	355	1960	10.4	0
Cincinnati Gas & Electric	Cincinnati, Oh.	854	10	387	498	159	1908	15.7	0
South Carolina Electric-Gas	Columbia, S.C.	990	9	242	498	161	1900	NA	0
Oklahoma Gas & Electric	Oklahoma City, Okla.	940	25	322	222d	325	1834d	16	0
Pacific Power & Light	Portland, Ore.	1176	8	337	245	24	1790	14.6	85

* – does not include cars; a – includes vans; b – includes pick-up trucks; c – includes vans and light trucks; d – does not include contract cars; e – does not include semi-construction equipment; NA – not available.

PRIVATE FLEETS

STATE GOVERNMENT#	Headquarters	Straight Trucks	Tractors	Trailers	Cars	Off Highway	Total Vehicles	*Annual Mileage (millions)
North Carolina DOT/Hwy Div	Raleigh	5542	101	862	0	11,641	18,146	65
Texas Hwy & Public Trans	Austin	6940	122	112	1150	9372	17,696	117
California DOT	Sacramento	4733	75	295	3069	4186	12,358	NA
Massachusetts Motor Vehicle Management Bureau	Boston	3486	0	0	3311	2628	9425	NA
Virginia Hwy & Trans Dept	Richmond	4140	20	62	2700	2437	9359	NA
Pennsylvania DOT	Harrisburg	4362	58	238	676	3836	9170	NA
Georgia DOT	Atlanta	1380	64	322	663	6640	9069	NA
Florida DOT	Tallahassee	3004	63	400	1192	2586	7245	75
New York DOT	Albany	3840a	71	755e	789	1717	7171	45
Kentucky Trans Cabinet	Frankfort	4682c	26	34	1792	141	6675	70d
NJ DOT	Trenton	1335b	6	7	658	4645	6651	30
Michigan Management/Budget Dept, Motor Trans Div	Lansing	1471	16	6	5134	11	6638	NA
Missouri DOT/Hwy Dept	Jefferson City	2544a	16	16	635	2825	6036	NA
South Carolina Hwy/Public Trans	Columbia	2706	244	287	2243	NA	5480	NA
Arkansas Hwy. Trans. Dept.	Little Rock	1762	68	29	278	3299	5436	37
Ohio Highway Department	Columbus	1790	28	38	1420	1924	5200	56
Oregon DOT/Hwy Div	Salem	957	32	287	1357c	2349	4982	NA
Indiana Hwy Dept	Indianapolis	1946c	520	115	1226b	985	4792	40
Illinois DOT	Springfield	2253	15	300	907	0	4496	60
Alaska DOT	Juneau	2626c	23	116	657	1021	4443	NA
Minnesota DOT	St. Paul	2540c	36	145	376	490	3500	NA
Colorado Dept. Highways	Denver	1970b	24	331	322	793	3440	NA
Iowa DOT	Ames	2106	12	12	529	750	3409	22
New Mexico Hwy. Dept.	Santa Fe	1412a	61	548	333	890	3309	24
Kansas DOT	Topeka	1485c	17	71	234	1147	2954	NA
North Dakota Hwy. Dept.	Bismarck	330	16	16	525	2000	2887	23
Tennessee Dept. Gen. Ser.	Nashville	258	15	0	1604b	413	2290	35
Maryland Hwy Admin	Baltimore	950	14	16	250	1000	2230	NA
Arizona DOT	Phoenix	1386	17	211	229	384	2227	20
Utah DOT	Salt Lake City	1329	14	113	241	485	2173	28
Mississippi Hwy. Dept.	Newton	1518	47	174	248	45	2032	10
D.C. Dept of Pub Works	Washington	1546c	22	75	321	67	1956	1
Montana Hwy Dept	Helena	980	61	141	125	498	1805	15
West Virginia Hwy Dept	Charleston	911	23	261	414	177	1786	NA
South Dakota DOT	Pierre	1084b	9	80	83	524	1780	NA
Nebraska Dept. Roads	Lincoln	545	43	46	235	0	1655b	11
Wisconsin Dept of Admin	Madison	5	0	0	1600	0	1605	35
Maine DOT/Motor Trans Ser	Augusta	600	12	200	421	250	1483	NA
Alabama Dept. Pub. Safety	Montgomery	20	5	0	1200	0	1225	NA
Connecticut DOT	Wethersfield	744	16	NA	NA	420	1180	9
Washington Dept. Nat. Resources	Olympia	616	7	160	251	128	1162	9.2
New Jersey Turnpike Auth.	Hightstown	350	4	81	250	450	1135	NA
Idaho DOT	Boise	918a	20	73	114	0	1125	13
Delaware DOT	Dover	540a	11	12	229	175	967	NA
New Hampshire Hwy Pub Works	Concord	507b	2	8	218	131	866	10
Hawaii DOT	Honolulu	272	8	30	114	149	573	NA

* – does not include cars; # – may not include all departments; a – includes pickup trucks; b – includes pick-ups and vans; c – includes pick-up trucks, vans and miscellaneous vehicles; d – includes cars; e – includes all trailers, not just semi's; NA – not available.

PRIVATE FLEETS

CITY GOVERNMENT#	Trucks	Tractors	Trailers	Cars	Off Highway	Total Vehicles	Annual Mileage (millions)	% Leased
New York City, N.Y.	4031	60	1690g	6983b	1080h	20,764	100	0
Los Angeles, Calif.	4235g	40	375	1200	250	6100	3	0
Baltimore, Md.	2700fn	15	25	2000b	400	5140	NA	0
Atlanta, Ga.	953	38	134	1385b	2652	5126	NA	NA
Phoenix, Ariz.	2003e	152	297	1528c	447a	4427a	34.6	0
Dallas, Tex. Equip Services Dept	880	28	140	1644	430	4165c	48.4	.003
San Francisco, Calif.	911	31	18	1050b	1404	3414	NA	0
Cleveland, Oh.	1326	6	166	1065	790	3353	15.6	0
Fort Worth, Tex.	1067	4	120	985	728	2904	17.4	0
Austin, Tex.	1137	74	203	841	552	2807	10	0
Kansas City, Mo.	1123	59	27	620	402	2231	NA	0
Miami, Fla.	650	2	50	1100	250	2052	NA	1
Virginia Beach, Va.	600	10	80	500	810	2000	20	0
Toledo, Oh.	520	336	164	448	87	1893	10.1	1
Akron, Oh.	200h	4	15	400	150	1800	NA	0
Sacramento, Calif.	345	5	165	935	229	1679	12	0
Salt Lake City, Ut.	661	34	19	660	274	1648	NA	0
San Diego, Calif.	1150	82	82	115	175	1604j,l	14.5	0
Long Beach, Calif.	588	4	78	640	252	1562	NA	0
Charlotte, N.C.	392	4	4	952	131	1475	15.5	0
San Jose, Calif.	487	31	66	518	364a	1466b	12.3	0
Honolulu, Hi.	640	20	70	500	220	1450	NA	0
Baton Rouge, La.	402	10	43	832	145	1432	NA	0
Norfolk, Va.	572	2	26	430	382	1412	9	0
Lexington, Ky.	410	61	37	551	319	1378	9	0
Anaheim, Calif.	337	1	91	361	556	1346	5	2
Greensboro, N.C.	472h,i	2	92	379	336	1279	10.5	0
Louisville, Ky.	348	77	42	764	0	1231	NA	NA
Tallahassee, Fla.	586	8	109	255	216	1174	9.1	0
Clearwater, Fla.	341	11	67	200	498	1117a	4	0
Jackson, Miss.	450	20	20	500	125	1115	NA	0
Raleigh, N.C.	456	1	80	351	168	1056	9.4	.1
Orlando, Fla.	407	63	138	396	28	1032	NA	0
Riverside, Calif.	488	2	95	237	171	993	NA	0
Ft. Lauderdale, Fla.	361	5	177	400	47	990	4.2	0
Lubbock, Tex.	463		143	378		985		0
Shreveport, La.	305	12	62	335	123	980	NA	0
LA, Calif. Fire Dept	513	75	75	304	10	977	NA	0
Corpus Christi, Tex.	265	118	69	339	137	928	NA	0
Winston-Salem, N.C.	367	3	27	395	126	918	7.3	0
Montgomery, Ala.	311e	2	2	336b	73m	913a,c,o	NA	0
Knoxville, Tenn.	366	5	22	347	117	857	14	54
Rochester, N.Y.	345	1	29	360	95	830	7	0
Pontiac, Mich.	175	1	28	102j,l	488a	794,c,d	NA	.007
El Paso, Tex.	532	14	34	83	109	772	NA	0
Savannah, Ga.	358	1	1	318	88	766	NA	0

* – does not include cars; # – may not include all departments; a – includes miscellaneous vehicles; b – includes police fleet; c – includes pickups, vans, jeeps, motorcycles, etc.; d – does not include education or fire dept; e – includes fire trucks; f – includes 340 light trucks; g – includes vans; h – includes dump trucks; i – includes pick-up trucks; j – does not include fire dept; k – does not include school bus fleet; l – does not include police dept; m – includes street maintenance equipment; n – includes 300 school buses; NA – not available.

PRIVATE FLEETS

PETROLEUM	Headquarters	Straight Trucks	Tractors	Trailers	Cars	Off Highway	Total Vehicles	Annual Mileage (millions)	* % Leased
Ashland Oil Inc.	Ashland, Ky.	2400	938	1800	3600	1200	9938	NA	2
Phillips Petroleum	Bartlesville, Okla.	2972	160	684	689	1547	6052	NA	0
Tenneco, Inc	Houston, Tex.	2783b	190	450	1900	125	5448	NA	80
Conoco Inc	Houston, Tex.	2000	365	650	1000	800	4815	NA	0
Dowell Schlumberger	Tulsa, Okla.	780	725	1044	2000	NA	4549	5.0	NA
Petrolane, Inc	Long Beach, Calif.	2508	125	272	199	NA	3104	NA	39
Arco Oil & Gas	Dallas, Tex.	833	43	366	558	517	2317	26.9	0
Exxon Co USA	Houston, Tex.	295	281	275	700	0	1551	28.7	0
Chevron USA	San Francisco, Ca.	120	150	420	650	0	1340	NA	0
Empire Gas Corporation	Lebanon, Mo.	975	41	107	12	40	1275	30	0
Agway Petroleum Corporation	Syracuse, N.Y.	320	26	28	0	0	1225	12	0
Natural Gas Pipeline Co of Am	Lombard, Ill.	584	139	117	301	0	1141	17	0
Texaco Refining & Mkt, Inc	Houston, Tex.	54	151	191	714	NA	1110	35.7	100
Welltech, Inc	Houston, Tex.	475	46	50	25	470	1066	20.2	37
Amerigas, Inc	Valley Forge, Pa	350	150	225	335	0	1060	22	65
Total Petroleum Inc.	Denver, Co.	297	221	245	223	63	1049	30	96
Liquid Carbonic Corporation	Chicago, Ill.	154	250	630	0	0	1034	25	30
Mobil Oil Corp (c)	Fairfax, Va.	50	310	410	0	160	930	22.0	5
Big Three Industries, Inc	Houston, Tex.	133	131	357	220	80	921	NA	0
Transco Energy Co	Houston, Tex.	475	10	100	280	50	915	13	0
Meenan Oil Co	Wantagh, N.Y.	490	40	35	94	6	665	NA	0

* – does not include cars; a – includes pick-up trucks; b – includes light trucks and vans; c – marketing dept only; NA – not available

FEDERAL GOVERNMENT*	Trucks & Tractors	Cars & Station Wagons	Ambulances	Buses	Total Vehicles
US Postal Service	123,282	14,207	0	8	137,497
General Services Administration (a)	34,261	51,704	158	3677	89,800
Air Force	46,252	6115	1619	2411	56,397
Army	34,176	10,010	1134	2834	48,154
Agriculture Department	26,730	4122	1	46	30,899
Navy	24,304	3296	639	996	29,235
Justice Department	4066	12,116	7	132	16,321
Interior Department	12,571	1794	11	156	14,532
Department of Energy	9852 1	1974	58	278	12,162
Treasury Department	1167	6942	1	14	8124
Civil Works, Corps of Engineers	6224	894	4	19	7141
Marine Corps	5855	684	0	320	6859
Tennessee Valley Authority	2282	1392	13	0	3687
State Department	1558	1079	11	0	2648
Labor Department	1263	337	15	49	1664
National Aeronautics & Space Admin	1000	171	13	11	1195

a – most vehicles are in Interagency Motor Pool and rented or leased to other government fleets. There is no duplication with other fleets listed; * – source: General Services Administration Report, printed 1988.

Attention Private Carriers:

Companies that operate 300 or more vehicles and wish to be considered for inclusion in CCJ's 1988 list of private fleets should mail a self-addressed envelope to: Fleet List, CCJ, Chilton Way, Radnor, Pa. 19089-0060. Your return envelope will be used to forward a questionnaire.

20 YEAR ANALYSIS OF

The Top 100 revenue producers' operating ratios 10 and 20 years ago are comparable to those earned in 1987. But the Top 100's big boys—UPS, Yellow Freight, Roadway Express and Consolidated Freightways—are capturing an increasing share of the group's revenue. In 1968, the four garnered 19.5% of the Top 100 revenue; last year they had 40.0%. The four leaders' aggregate profits increased from 31% of the Top 100 total to 48% last year.

By **PARRY DESMOND**, *Executive Editor*, **NANCY MOORE**, *Associate Editor*, and **MARGARET ROMAN-SLAVIN**, *Contributing Editor*

Fleetmen who have seen a lot of rubber meet the road often look through rose-colored glasses when recalling the good old days—those preceding passage of the federal 1980 Motor Carrier Act. But a review of the Top 100's 20-year history shows that the trucking business has never been a place for the faint of heart.

Analysis reveals the industry's leading revenue-producers have always had a tough time trying to make a buck. Examination of the reams of data generated since CCJ started publishing information on the nation's Top 100 for-hire carriers in 1968 shows that fleets succumbed to the vagaries of the marketplace in the 1960s and 1970s as well as in the current decade.

And, based on 1967 constant dollar values (see the Revenue vs. Expense graph), the Top 100's aggregate financial performance is not significantly different today than it was in the previous two decades. As a whole, Top 100 revenue producers had operating ratios (ORs) comparable to those earned in today's highly competitive trucking environment.

Although there have been few position shifts among the top five fleets in the listings over the past two decades, there has been an "incredible change" in the overall makeup of the Top 100, observes Tony Robertson, analyst with Alex Brown & Son, the Baltimore, Md., securities firm. More than 150 different carrier names appeared on the list through the 20 years. And most of the companies that entered the fray since 1980 haven't generated the dollar volume required to get on the Top 100 bandwagon.

In fact, only 18 companies have made the Top 100 every year since 1968.

They are: Allied Van Lines, Anchor Motor Freight, Arkansas Best Freight, Carolina Freight Carriers, Chemical Leaman, Consolidated Freightways, North American Van Lines, Overnite Transportation, Pacific Motor Trucking, Preston Trucking, Roadway Express, Signal Delivery Service, St. Johnsbury, Transcon Lines, United Parcel Service (both of its subsidiaries), United Van Lines and Yellow Freight.

However, the Top 100 data confirms a phenomenon that's been growing steadily, particularly since 1980. The big boys—UPS, Yellow Freight, Roadway Express and Consolidated Freightways—continue to capture an ever-increasing share of the Top 100 revenue. The industry's consolidation is dramatically reflected when the leading five carriers' combined percentage of operating revenue is compared to the Top 100's total.

In 1968, fleets that gained the first five slots garnered 19.5% of the total revenue and 31.5% of the total profits. Twenty years later, the comparable group claims 40% of Top 100 revenue and 48% of the profits. And the four leading carriers' aggregate profits increased from 31% of the Top 100 total to 48% last year.

UPS: Consistently No. 1

The nation's largest fleet, UPS, has led the Top 100 since 1968. Headquartered in Greenwich, Conn., but divided into two corporate entities, the package delivery service is designated as a common carrier by the Interstate Commerce Commission. Thus UPS uses the same form that freight haulers do to report to the ICC, which is the source of the raw data for the Top 100.

UPS has continually increased its share of the total Top 100 revenue. In 1968, it captured 8.4% of the group's total revenue, and since 1984 its share has consistently exceeded 25%.

Although it never had the Top 100's lowest operating ratio, UPS consistently has been one of the group's profit leaders.

In addition to the two UPS subsidiaries that report individually to the ICC, three less-than-truckload fleets have competed for the remaining slots in the top five.

Consolidated Freightways held second place in 1968, 1969 and 1970 and then gradually eased into the fifth slot in 1984. Roadway Express has bounced between second, third and fourth positions throughout the 20 years. Although Yellow Freight didn't make the top five until 1969, it has gained on its two major competitors by hanging onto third position—just behind the

THE TOP 100

Using constant dollars based on the 1967 Consumer Price Index, these two trend lines reflect the financial performances of the Top 100 and the list's four for-hire fleets – United Parcel Service, Roadway Express, Consolidated Freightways and Yellow Freight. The Top 100's nose-dive in 1980 resulted from writing off operating rights following implementation of the 1980 Motor Carrier Act.

Trend lines reflect constant dollars, based on 1967 Consumer Price Index values.

two UP subsidiaries – for the past three years.

Over 20 years, the three leading LTL fleets' share of the Top 100 revenues increased from 11.2% in 1968 to 17.4% last year.

Highlights of CCJ's Top 100 reports over the past two decades include:

1968: United Parcel Service, leading the Top 100 since the list was established in 1968, had $407.6 million in combined revenue. If the package delivery service had been eliminated from the listing, Consolidated Freightways would have been on top with $241.5 million. The next largest fleet was Roadway Express with $184.1 million.

The Top 100's average operating ratio was 94.4, while the industry average was 95.0.

Although none of them were among the top 50 revenue producers, the five carriers that had the lowest ORs and their Top 100 rankings were:

1. Tri-State Motor Transit, Joplin, Mo. (No. 72) – 76.4;

2. Arkansas Best Freight System, Fort Smith Ark. (No. 51) – 84.6;

3. New York Central Transport, Cleveland, Oh. (No. 53) – 85.3

4. Preston Trucking, Preston, Md. (No. 89) – 86.3;

5. Commercial Carriers, Romulus, Mich. (No. 84) – 86.4.

Only New York Central no longer is in operation.

1969: The Top 100, as well as all Class I and II fleets, averaged a 14% increase in revenue over '68.

The T.I.M.E. Freight, DC International and Los Angeles-Seattle Motor Express merger, forming T.I.M.E.-DC, created a $139.3 million fleet that ranked No. 6 on the Top 100 list.

1970: The Top 100 fleets' aggregate net income dropped 34% compared to 1969, despite a 3% increase in revenue. Although the group's average OR was 96.1 in 1970, Santa Fe Trail Transportation was the most profitable carrier among the Top 100 with a 76.7 OR.

For the 3,000 (90%) reporting Class I and II carriers, the composite OR dropped from 95.6 in 1969 to 96.3 in 1970.

The number of Class I carriers reached 1,503 in 1970. In 1965, there had been 1,250, according to the ICC. There were 1,998 Class II fleets in 1970, compared to 2,615 in 1965. But there was miniscule growth – 11,706 vs. 11,700 – among the Class III fleets over the same five-year period.

As expected, car carriers' revenue fell sharply because of the General Motors strike.

1971: Revenue increased by more than $1 billion and profits were nearly three-fold higher than in 1970. As a result, the Top 100's average OR dropped from 96.1 to 93.2, one point below the average.

Only four of the Top 100 lost money in 1971; the previous year there were 12 losers.

There were two newcomers – All-

Continued

20 YEAR SUMMARY OF CCJ TOP 100 DATA

68	4,879,734	4,606,887	139,514	94.4%	30,819	56,334	126,166	94,475	5,052,414
69	5,561,574	5,295,048	131,016	95.2%	32,630	62,494	143,577	166,818	5,450,392
70	5,333,816	5,135,148	73,835	96.3%	22,128	61,883	147,046	127,802	5,164,228
71	6,831,324	6,363,928	243,310	93.2%	33,549	66,656	156,805	154,659	5,826,183
72	7,762,863	7,277,935	263,649	93.8%	37,364	70,602	163,404	183,745	6,374,914
73	8,978,082	8,490,310	282,452	94.6%	37,295	81,523	187,303	201,616	7,078,973
74	9,817,808	9,289,508	280,351	94.6%	39,259	86,359	203,971	192,396	6,715,454
75	9,811,963	9,280,583	248,114	94.6%	39,679	84,277	195,957	174,258	6,195,343
76	11,435,634	10,835,687	351,645	94.8%	43,003	89,326	202,015	200,584	7,126,284
77	13,849,486	13,184,659	486,532	95.2%	43,635	93,728	213,565	213,927	7,916,548
78	16,577,178	15,666,958	500,575	94.5%	45,639	101,321	231,831	228,936	8,060,304
79	18,906,308	18,191,466	400,510	96.2%	52,032	110,847	267,822	214,456	8,386,776
80	19,927,264	19,006,901	13,892	95.4%	47,829	100,975	239,251	186,435	7,505,907
81	21,642,319	20,697,280	657,893	95.6%	45,814	92,886	221,929	153,320	6,705,462
82	20,552,870	19,875,822	329,945	96.7%	34,549	82,378	205,014	117,149	5,043,303
83	21,957,405	21,192,331	765,075	97.8%	44,446	84,705	222,126	145,639	7,306,862
84	24,613,472	23,266,398	782,831	94.5%	49,267	87,547	245,594	181,990	8,882,097
85	25,016,054	23,594,793	734,023	94.3%	54,541	83,877	259,231	157,967	8,056,665
86	26,900,993	25,081,196	943,195	94.0%	56,323	89,029	281,993	235,282	8,805,872
87	28,155,417	27,157,323	480,580	96.5%	*	*	*	177,611	9,191,738

Although the Top 100's average operating ratios in the 1980s are comparable to those of the previous two decades, analysis shows that the 10 leading for-hire fleets have increased their share of the market to the point that they captured approximately 60% of the Top 100 profits in 1987. The Top 100 revenues, expenses and net income grew at a annualized rate of 10% in the 1968-1986 period, according to George Morris, analyst with Prescott, Ball & Turben, the Cleveland securities firm.

* – Equipment data for all Top 100 fleets was not available in time for this issue because the ICC's annual report deadline for 1987 information was extended, and cumulative equipment information was not included in the fourth quarter report filed by specialized carriers.

American Transport, Sioux Falls, S.D.; and BN Transport, Galesburg, Ill., an outgrowth of a merger of Northern Pacific and Burlington Truck Lines.

Smith's Transfer, of Staunton, Va., made the biggest jump among general commodity freight haulers—No. 28 to No. 16—primarily due to the acquisition of Bell Lines in 1970.

1972: The Top 100 had a 12.3% gain in total revenue over the previous year. Net income was up 8.1%, compared to a 10.4% increase for the industry. The 100 bellwether fleets' accounted for 46% of the revenue and had a combined 94.7 OR.

While the 50 biggest revenue producers' revenues were up 12%, their net income increased only 5.3%.

1973: Like the *Fortune 500* industrial corporations, CCJ's Top 100 carriers had a healthy gain in 1972. While industrials' sales were up 19.6%; the leading fleets registered a 17% increase. Inflation accounted for a significant share of both increases.

The net income picture, however, was far different.

Fortune's industrials were up a "breathtaking 39%," but Top 100 fleets post-tax income increased by only 7.2%.

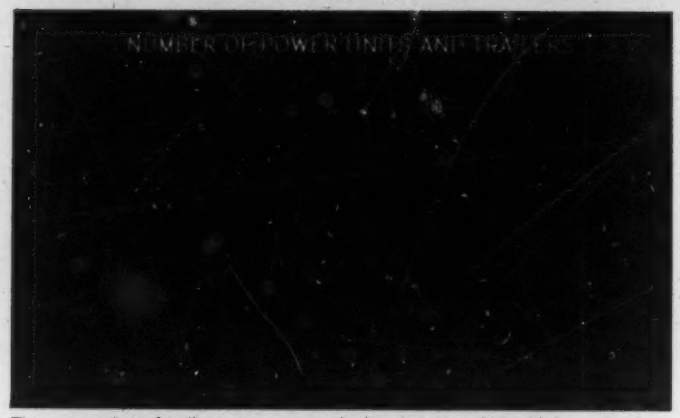
The energy crunch began to impact fuel costs in 1973.

The industry's more than 3,700 Class I and II carriers fared worse. While revenue for the group was up 8.4%, income was down 9.4%. For the first time in many years, the number of carriers in these revenue classes dropped slightly.

Hennis Freight Lines, Winston-Salem, N.C., bounced back from bankruptcy and a 1972 loss of $2.2 million to a $429,000 profit this year.

1974: While the Top 100 carriers increased revenue by $839 million, total profits declined $3.8 million. A recession that began in 1974 severely impacted car carriers (three dropped out of the Top 100) and truck lines that serve automotive industry suppliers. Although fuel costs skyrocketed, expenses in '74

20 YEAR ANALYSIS OF THE TOP 100



The proportion of trailers vs. power units has increased at a higher rate since 1982 primarily because of twin trailers. Overall, the number of trailers expanded at 4.5% annual rate while tractors increased at a 2.6% rate, according to George Morris, an analyst with Prescott, Ball & Turben, Cleveland.

increased at a slower pace than they had the two previous years.

For the second consecutive year, the Top 100 average OR was 94.6. A-P-A Transport of North Bergen, N.J., had the best OR—80.4.

The ICC changed its financial reporting classifications. The new revenue criteria were: Class I, over $3 million; Class II, over $500,000; Class III, under $500,000.

1975: With the full impact of the mid-'70's recession, the Top 100 suffered a $5.8 million revenue loss compared to the previous year. The loss in net income was $51.3 million.

Expenses were cut a total of $9.4 million. Of the 20 carriers that reported losses, only four were repeaters from 1974.

Preston Trucking, Preston, Md., had the best OR—83.7.

For the 16,005 reporting fleets—an increase of 895 over the previous year—the industry's average OR increased from 95.0 to 95.6.

1976: Though the Top 100 carriers had a post-recession turnaround, several major fleets closed up or filed for protection under the federal bankruptcy law. They included: Eastern Freightways, Associated Transport, M&M Transportation and Eastern Express.

Despite the financial turmoil, A-P-A Transport racked up an astonishing 78.9 OR.

Among the 16,472 ICC-certified carriers reporting to the ICC, total revenue increased $2.6 billion and net income was up $224 million. However, the average OR declined to 95.1.

1977: Industry leaders increased total profits to $487 million, up nearly 10% over 1976—based on sales of $14 billion—despite significant inflation, particularly in labor and fuel costs. The Top 100's OR was 95.2, while the average OR for all Class I and II fleets was 94.6.

The three carriers that reported the best ORs—A-P-A Transport, 80.2; Overnite Transportation, 84.4; Jones Truck Lines, 87.9—were all regional operations.

1978: Industry leaders made a comeback despite the ICC's reluctance to grant fleets—particularly household goods movers—rate relief. Only six Top 100 fleets suffered financial downturns, but three of them—Allied Van Lines, United Van Lines and Bekins—had ORs that exceeded 100.

A-P-A was the OR leader with a 79.1.

For the 16,874 reporting fleets, revenue increased from $24.9 billion to $29.3 billion. Their composite OR was 94.7.

1979: While total revenue for the Top 100 carriers was up 14.1%, expenses increased 16.1%, resulting in a 20% drop in profits. More alarming: 21 fleets on the list had ORs above the 100 level.

One factor that impacted the expense column was the sharp increase in the number of purchases of trailers (+36,000) and trucks (+14%), compared to the previous year.

Despite the financial woes, firms with low ORs included: A-P-A, 79.7; Overnite, 85.6; Matlack, 86.8; Willis Shaw, 87.7; C&H Transportation, 88.0; Bowman, 89.8.

The Top 100's average OR was 96.3, while the industry had a 96.1 OR.

1980: Continued economic turmoil wreaked havoc on the Top 100. Total profits nose-dived to $14.1 million from $400.5 million the previous year.

In addition to July implementation of the 1980 Motor Carrier Act, inflation, high interest rates and reduced consumer spending took their toll. As a result, for example, Wilson Freight of Cincinnati filed for bankruptcy, and Johnson Motor Lines of Charlotte shut its doors.

Although 51 companies showed deficits, 33 of them reported ORs under 100 because most fleets took large tax write-offs for the estimated value of their operating rights.

Deregulation particularly hurt truckload carriers who engaged in rate-cutting battles, compounded by freight lane imbalances.

A-P-A continued its OR leadership with a 82.2 rating. And Roadway—No.2 on the list and, other than UPS, the sole freight hauler to break the billion-dollar, gross revenues barrier—reported an increase of earnings for the 27th consecutive year. Continued

20 YEAR ANALYSIS OF THE TOP 100

They way we were...in 1968

Assassinations of political leaders. Protests against the war in Viet Nam. Those are some of the recollections you'd probably hear if you asked a typical American – who's at least 35 years old – what life in the U.S. was like in 1968.

But if you queried truckers about what the industry was like two decades ago, you would probably hear about the good old days when the average operating ratio was 95.0, and the industry leader – Tri-State Motor Transit, Joplin, Mo. – had a 76.4 OR.

Back in 1968, when power units with a GVW in excess of 22,000 lb cost $5,000 to $25,000, profits were virtually guaranteed via regulation.

Here are some items, elicited from issues of CCJ, that reflect what was happening in trucking in 1968:

- Gasoline engines with a 330 to 637 CID range dominated the heavy truck market.
- Vacuum hydraulic brakes were standard on trucks with a GVW up to 30,000 lb.
- Tires were constructed with nylon cord.
- Salaries for fleet maintenance superintendents ranged from $6,500 to $20,000.
- The Norwalk Division, of United Buckingham Freight Lines, Spokane, Wash., placed an order for 744 White tractors – the largest single order ever placed for heavy trucks.
- Gordon Cantlay, vice president of maintenance for Western Gillette, claimed that four years of pulling triples had proved:

"The ideal engine for this work in the West should be in the 550- to 600-hp range. We're not saying that a lower horsepower engine couldn't do it; the problem becomes one of how long it would hold up. I can assure you the average truck that pulls a single 40-footer does not have enough power to pull doubles adequately."

- The industry was pushing federal legislation to increase maximum single-axle weights from 18,000 lb to 20,000 lb, and tandems from 32,000 to 34,000 lb. The bill also called for increasing trailer widths to 102 in. That was finally achieved through the 1982 Surface Transportation Assistance Act.
- Proving that the more things change, the more they stay the same, two areas that attracted the most attention at a Society of Automotive Engineers meeting were diesel smoke emission and truck electrical systems.
- Manufacturers agreed that the polyglass tire represents the most significant advance in industry technology since the tubeless tire was introduced.
- The Teamsters Union and United Auto Workers were talking about a merger.
- Ward Trucking Corp., of Altoona, Pa., gave 50 silver dollars to each employee in every six-month period the firm's operating ratio stayed below 90.
- New York State passed a law that prohibited idling of diesel engines in trucks and buses for more than three minutes.

1981: After more than a year of gloom and doom, 73 of the Top 100 reported increased profits over last year. In addition to the industry's apparent accommodation with deregulation, the higher margins also reflected the benefits realized from the 1981 Tax Recovery Act.

On the other hand, the industry had its worst year since 1960, as post-tax income declined 13.9%.

1982: With a record-setting 39 carriers in the Top 100 reporting combined losses of $191 million, this recession year's list disclosed the biggest shakeup since 1969. For the first and only time in Top 100 history, the Top 100's total revenue declined.

The biggest losers were: McLean Trucking of Winston-Salem, $17.3 million; Pacific Motor Freight of San Francisco, $16.6 million; Interstate of Grand Rapids, Mich., $16.3 million.

Although 41 carriers had ORs over the 100 mark, A-P-A Transport did even better than the previous year with an 82.9. Overnite was second with an 86.2. While the Top 100 had a 96.7 average OR, the industry's average OR climbed from 95.3 to 97.0.

1983: Matching a resurgent economy, the Top 100 made a strong recovery this year. With $765.1 million in profits, the leaders doubled the margins gained in 1982. However, expenses grew faster than revenue and, as a result, the industry leaders' average OR was a record-high 97.8.

J.B. Hunt of Lowell, Ark., with a 79.1 OR, took over the operating ratio leadership position long held by A-P-A Transport which was second with an 82.9.

1984: The Top 100s' composite OR rolled back to 94.5 as revenue shot up from $21.7 billion in 1983 to $24.6 billion. However, the Top 100s' traditional leaders weren't at the head of the increased profits parade. Of the top five carriers, all but Yellow Freight reported revenue increases over 1983, but only Consolidated Freightways had a higher net income.

1985: Insurance costs that shot up as much as 400%, helped to create a $48.8 million downslide in profits. Although 22 fleets lost money, the Top 100 fleets garnered a 94.3 OR.

1986: The Top 100 recorded their lowest OR – 93.2 – since 1971 as the industry leaders' total profits reached $943.2 million, a 26% increase over 1985. However, 42 of the Top 100 fleets didn't increase profits.

1987: See details on last year's Top 100 in the previous article. □

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